

SurveyToGo

Enterprise

Designer User Guide

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Chapter 1 – Installation

Requirements

Before installing the SurveyToGo Designer, please make sure you have the following:

- SurveyToGo Installation Package – available from <http://www.dooblo.net/stgi>
- Windows 98 or later with the .NET Framework installed (you can obtain the .NET Framework for no charge at www.microsoft.com)
- Working internet connection

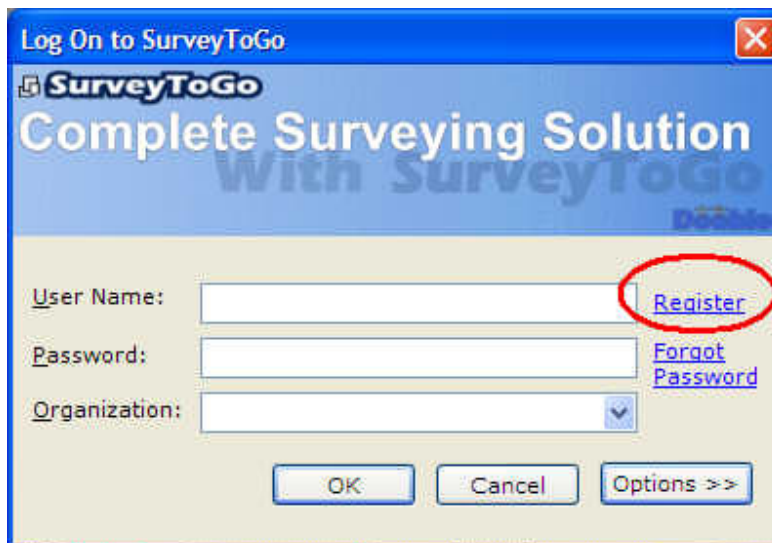
Installation

To install the SurveyToGo Designer, follow the instructions below:

1. Run the installation package and follow the wizard.

Registering

When you run the Designer for the first time, you will be required to register in order to obtain a login user and password. In order to register, simply click the small "register" link located on the login screen:



Once you click it you will need to fill out some details:



The image shows a 'Registration Wizard' dialog box. On the left, there is a graphic with the 'Dooblo' logo and the text 'Register To SurveyToGo'. Below this is an icon of three people and a server. On the right, the text reads 'Welcome To The SurveyToGo Registration Wizard'. Below this text are six input fields: 'User name:', 'Password:', 'Repeat Password:', 'Valid EMail:', 'Repeat EMail:', and 'Company Name:'. At the bottom right, there are two buttons: 'Cancel' and 'Register'.

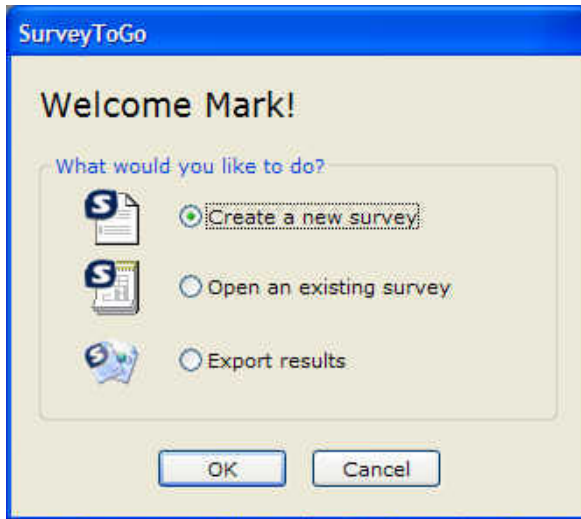
You will later on use the details you supplied in order to login to SurveyToGo. Once you click the register button, you will become registered and you will be able to login to SurveyToGo. Please note you will receive a registration-confirmation email right after you register.

Running the Designer for the first time

When running the designer for the first time, you will see the following screen where you will need to enter your connection details and administrative details:

Enter your user name and password as you have received it from your system administrator and enter the connection details as you have received them from your system administrator. These settings will be entered as defaults the next time you run the SurveyToGo Designer.

After logging in, you should see the following screen that allows you to choose each of the following:



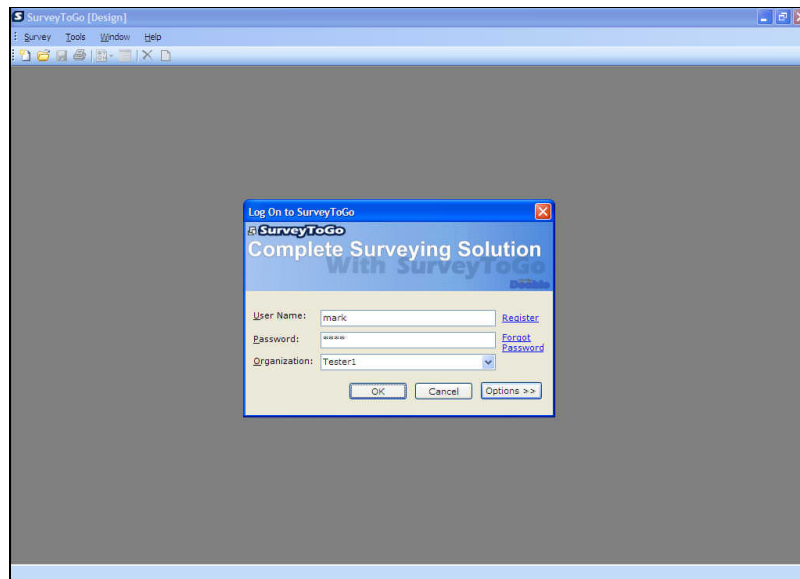
1. Create new survey
2. Open an existing survey
3. Export existing survey results

Chapter 2 - Creating a basic Survey

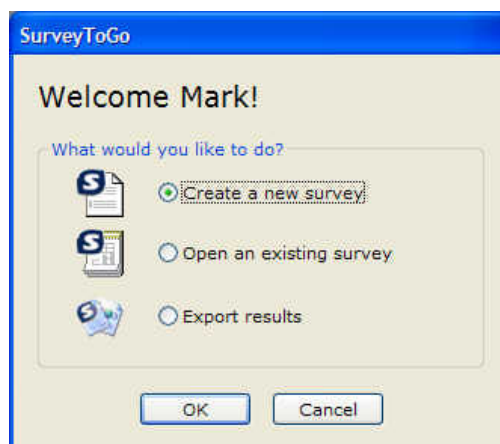
Creating the survey

To create a survey you first need to run SurveyToGo Designer by clicking:
Start > Programs > Dooblo > SurveyToGo > Designer

You will then need to login to SurveyToGo:



Simply enter your user name and password as you have received from your system administrator. You will then see the following screen, from which you will choose "Create New Survey", and press OK:

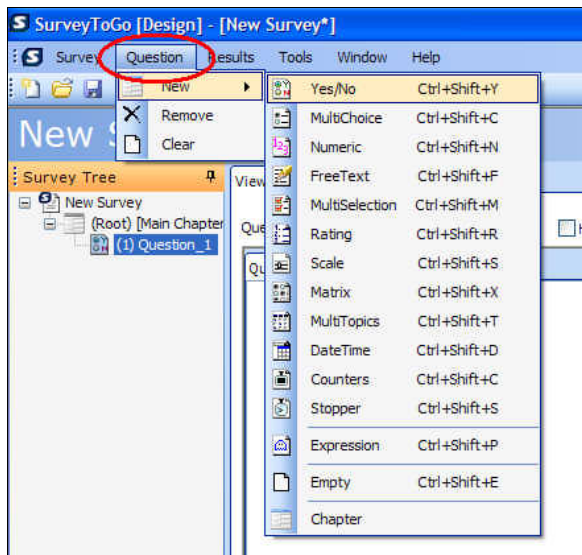


[illegible]

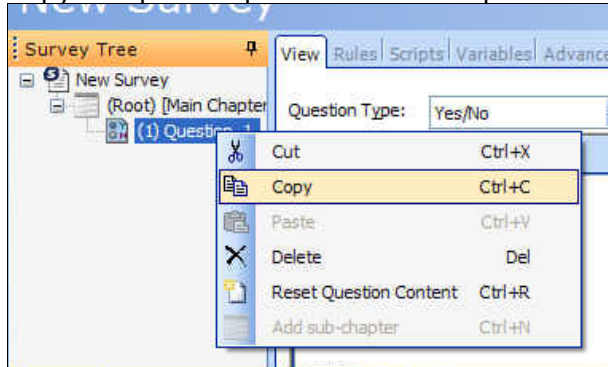
Adding Questions

SurveyToGo supports many question types. Some of which are only used in specific platforms while others can be used in all platforms. To add a question to the survey, you can choose from any of the following methods:

1. select Question > New > questionType:
- 2.



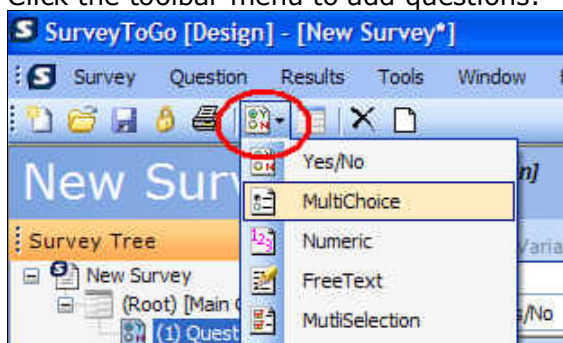
3. Copy and paste a previous entered questions:



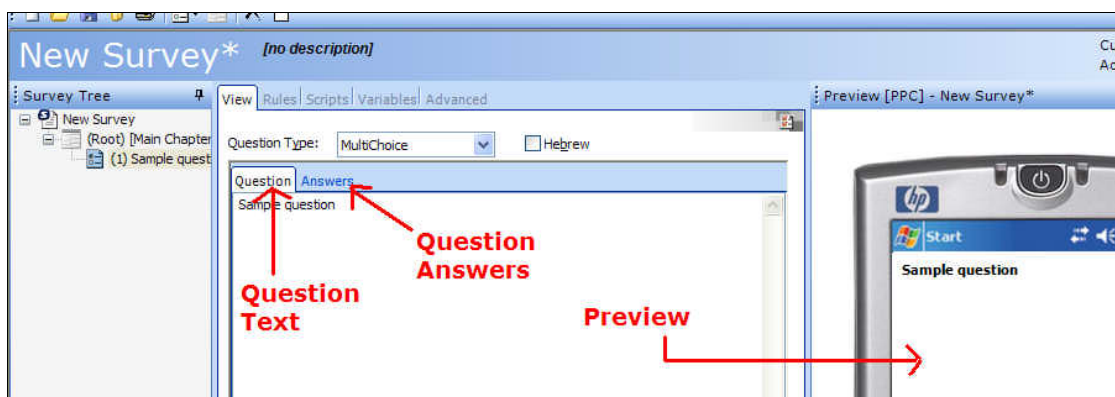
4. Click the "New" button on the navigation bar:



- Click the toolbar menu to add questions:



After adding the question, based on the question type you will have to fill in the possible answers and settings. The layout of configuring each question is as follows:



Component	Description
Question Text	This text can be formatted using the available formatting toolbox, please note that currently the only platform that supports the advanced formatting is the Web platform. The PDA platform ignores the formatting options.
Question Answers	based on the question type you select, you will need to add the answers for the question. Some questions do not require custom answers at all, while others require more advanced answers configuration.
Preview Pane	This pane shows you a preview of the question as it will be shown on the platform. The PDA preview is instant in that it shows you a preview "as-you-type" while the Web preview requires you to save the survey before it shows you the preview.

Configuring Question Properties

All questions have basic properties in common and are controlled from the following places:

View

The view options control the way the question and answers are displayed, and were covered in the previous section.

The screenshot shows the 'View' tab of the SurveyToGo Designer interface. At the top, there are tabs for 'View', 'Rules', 'Scripts', 'Variables', and 'Advanced'. Below these, the 'Question Type' is set to 'MultiChoice' with a dropdown arrow, and there is an unchecked checkbox for 'RTL'. The main area is divided into two sections: 'Question' and 'Answers'. The 'Question' section contains a text box with the text 'Which paper do you like the most?'. The 'Answers' section is currently empty. At the bottom of the window, there are navigation buttons: '<', 'Clear', 'Add Question', and '>'.

Component	Description
Question Type	Controls the type of the question. You can select from the various types by choosing from the dropdown list.
RTL	Controls whether this question will be right-aligned and will use the Hebrew language for button labels & other settings during the survey.
Question	In the textbox you enter the text of the question. You can use the formatting toolbox on the bottom to control the formatting of the question. Please note that the only the Web currently implements the formatting instructions. The PDA platform disregards the formatting settings.
Answers	For questions that require you to specify their answers (or their answer properties).
Topics	Some questions include the concept of 'Topics'. When configuring a Topics question, the actual topics are controlled from this tab.

Variables

The variables options control the way the question will be exported when using the built-in exporters of SurveyToGo.

The screenshot shows the 'Variables' tab in the SurveyToGo Designer. It contains the following elements:

- Variable Name:** Q_1
- Missing Value:** -1
- Short ID:** qu_001
- Export:** Checked checkbox.
- Restrict variables to SPSS format:** Unchecked checkbox.
- Not Include In Print:** Unchecked checkbox.
- NOTE:** This will effect all the questions in this survey
- Codings:**
 - Selected: Answers are coded in one variable (codes in list below). Includes a [Reset for Auto-Coding](#) link.
 - Unselected: Each answer is coded as a variable.
- Coding Table:**

Coding	Answer
1	New York Times
2	Holland Review
3	Le Monde
- Buttons:** Edit, Answer Properties, Export as text, Clear, Add Question.

Component	Description
Variable Name	The name of the Column when exporting with the built-in MS Excel export provider. The variable name shown when exporting with the built-in SPSS export provider.
Missing value	The value that will be entered if the question was skipped over or not entered into for any reason.
Short ID	This is the Alias for the question. You will see this ID in the exported data. This is for your use only and is optional.
Export	Checking this box (on by default) marks this question as a question who's answers will show up on the exported data. If you do not want the answers to show up on your exported data, deselect this box.
Not Include In Print	If you don't want this question to be printed when you click "Survey > Print" you can select this box.
Export As Text	If you select this box, the answers will show up on the exported data as text instead of codings.
Coding	This section controls the specific codings of the actual values shown when exporting. The coding schemes might differ by question type.

Configuring an "Other Specify" answer

If you need one of your answers to be an "Other specify" answer, you can do that by clicking the answer in the variable tab and clicking the "Answer Properties" button:

Answer Properties

Question:
Which paper do you like the most?

Answer Index: 0

Answer Text: New York Times

Answer Codes:

Variable Name: A_1_1

Un-Checked code: 0

Checked code: 1

☐ Other (Specify)

Variable Name: S_1_1

☐ Textbox inline

☐ Do not random

☐ Exclusive Answer

Cancel

OK

Then, check the "Other specify" box. This will make the PDA display a text box next to that answer if the surveyor selects this answer.

Advanced

The advanced options control various advanced options for the current question:

The screenshot shows the 'Advanced' tab in the SurveyToGo Designer. The panel is titled 'Advanced question options:' and contains several sections:

- Advanced question options:**
 - ☐ Allow "No Answer"
 - ☐ Include in selected subject answers
 - ☐ Starts a new page
 - ☐ Allow Comments
 - ☐ Hide Back
 - ☐ Custom Question
 - Attachment ID:
 - DI Name:
 - Class Name:
- Randomization:**
 - ☐ Randomized answers order
 - ☐ Include this question in a randomized questions group
 - Random Group:
- User-Defined Fields:**
 - Click [here](#) to modify values of user-defined fields for this question

View | Rules | Scripts | Variables | **Advanced**

Advanced question options:

☐ Allow "No Answer"

☐ Include in selected subject answers

☐ Starts a new page ☐ Custom Question

☐ Allow Comments Attachment ID:

☐ Hide Back Dll Name:

☐ Do not render text Class Name:

Question Attachments:

☐ Do Not Show To Surveyor

☐ Do Not Include As Performance ☐ Do Not Show Number

Randomization:

☐ Do not random (as part of a chapter)

☐ Randomized answers/topics order

☐ Include this question in a randomized questions group

Random Group:

< Clear Add Question >

Option	Description
Allow "No Answer"	Controls whether the subject is allowed to not answer the specific question and go to the next page/question. Beyond the scope of this manual.
Include in selected subject answers	
Starts a new page	For surveys with multiple questions per page, controls whether this question will start a new page when rendered on the various platforms. This setting overrides the number of questions per page setting in the survey properties page.
Allow Comments	
Hide Back	Do not display the back button on this question
Do not render text	
Custom Question	
Do not show to Surveyor	Don't display this question to the surveyor, only to the reviewer.
Do not include as performance	
Do not show	

number Do not random	If the chapter includes question randomization, do not include this question in the randomization.
Randomized answers/topics order	Enable answer / topic randomization
Randomization groups	Add this question to a pre defined randomization group. You can have unlimited randomization groups. In each groups the questions are randomized within the group.

Rules

The rules control the flow of the survey and are composed of both Entrance, Exit & Validation rules:

Component	Description
Question Entrance Rule	An expression that when evaluates to true, the current question will be displayed. If no expression exists, the question will also be displayed. If the expression evaluates to False, the question will NOT be displayed. Example of entrance rule: <u>"Answer (15) == 1"</u> When this rule is in place, the current question will only be shown if the answer to question number 15, was: 1
Jump Rules	A series of condition and their corresponding branching targets. Jump rules can either specify to go to a specific question/chapter or specify a custom action like submitting/canceling/filtering the current subject. Example of jump rule:

Validation Rules

“[condition] Answer (CurrQues) == 1 [action] Goto (5)”

When this jump rule is in place, if the subject answers 1 on this question, the survey will jump to question 5.

A series of expressions and messages. When an expression evaluates to True, the user cannot progress to the next question, and the configured message is shown. Example of a validation rule:

“[condition] Answer (CurrQues) + Answer (1) > 50 [message] Your answer for this question and the last one should be less then 50!!!”

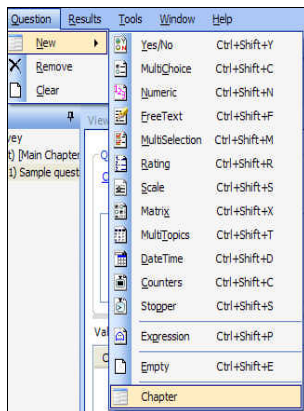
When this validation rule is in place, if the answer to this question + the answer of the previous question is more then 50, the message “Your answer for this question and the last one should be less then 50!!!” is shown and the user cannot progress to the next question.

Adding Chapters & Sub Chapters

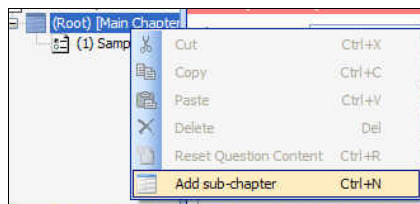
Chapters allow for a convenient way to organize your survey. You can either choose to make a chapter visible or simply use the chapter as a container for questions without making it visible during the course of the survey.

To add a chapter you can do one of the following:

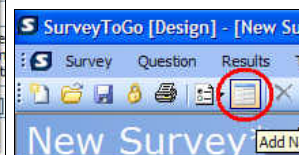
1. Select Question > New > Chapter
2. Right click on the Root Chapter > Add Sub Chapter
3. Click the Add Chapter toolbar icon



Method 1



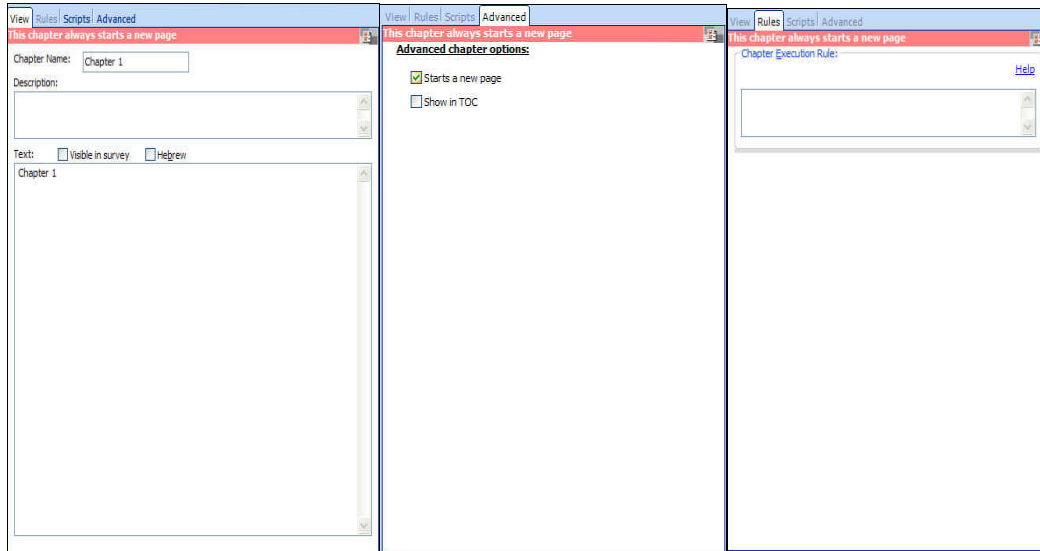
Method 2



Method 3

Chapter Settings

Chapters have the following properties:



Various chapter tabs that controls its properties

View Settings:

Option	Description
Chapter Name	The name of the chapter. This name will show up in the questions tree.
Description	Description of the chapter and its purpose.
Visible in survey	Controls if the chapter text is shown in the survey. If true, the chapter text will be rendered as an empty question.
Hebrew	Controls right-aligning of the chapter when visible.
Chapter Text	The actual text of the chapter that will be shown if the Visible in survey setting is set to true.

Advanced Settings:

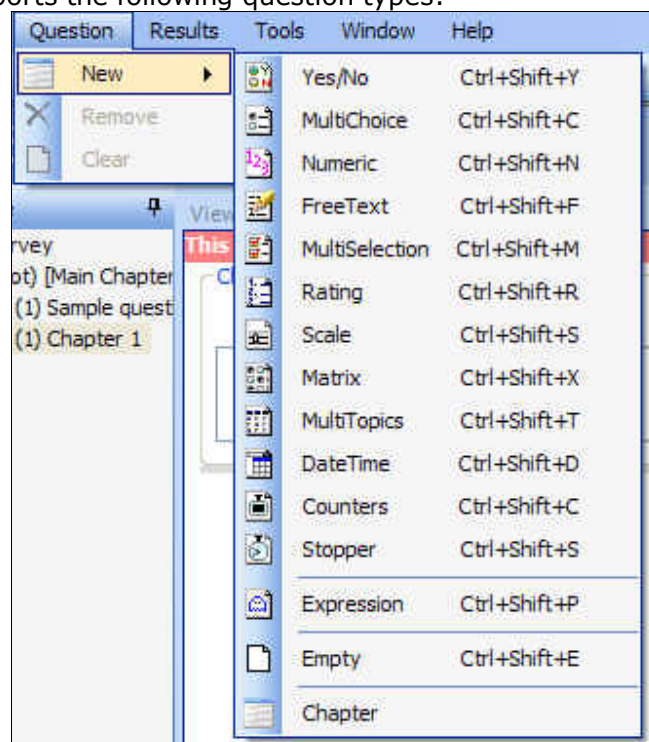
Option	Description
Starts a new page	For surveys with multiple questions per page, controls whether this chapter will start a new page when rendered on the various platforms. This setting overrides the number of questions per page setting in the survey properties page.
Show in TOC	When TOC (Table of contents) is enabled, controls whether this chapter is displayed in the TOC or not. The TOC is enabled/disabled by checking/unchecking this setting in the Root Chapter. When TOC is enabled, the PDA will display a TOC menu when running the survey. The TOC menu name will be taken from the root-chapter name, so you can for example rename the root-chapter to be "Chapters" and then that will be the name of the menu item.

Rules Settings:

Component	Description
Entrance Rule	Please refer to entrance rules of questions for more details.
Jump Rules	Please refer to jump rules of questions for more details.
Validation Rules	Please refer to validation rules of questions for more details.

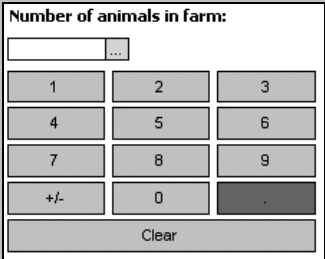
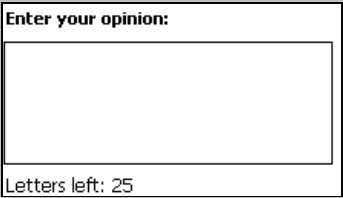
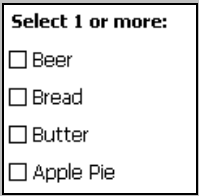
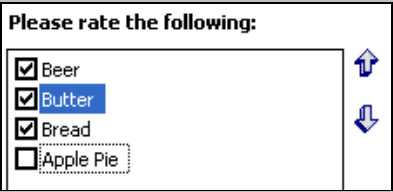
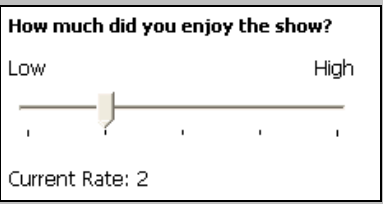
Question Types

SurveyToGo supports the following question types:



New question menu

Question Type	Description	Specific configurations	Example
Yes/No	Simple question allows the user to either select yes or no		<p>Do you like this question?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>
MultiChoice	User can select 1 answer from a list of answers	<ul style="list-style-type: none"> Can be rendered as list of radio buttons or a drop-down list 	<p>What media do you prefer?</p> <p><input type="radio"/> Newspapers</p> <p><input type="radio"/> TV</p> <p><input type="radio"/> Internet</p>

Numeric	<p>User can enter a numeric value only.</p> <ul style="list-style-type: none"> • Min/Max values can be set • Can be rendered with/without numeric panel 	
FreeText	<p>User can enter any free text he wants</p> <ul style="list-style-type: none"> • Can be rendered single line or multi line • Max length can be set. 	
Multi Selection	<p>User can select 1 or more out of a list of values</p> <ul style="list-style-type: none"> • Min/Max selections can be set 	
Rating	<p>(PDA Only) user can order the various items in order of importance</p>	
Scale	<p>User can select from a scale of 1 to N</p> <ul style="list-style-type: none"> • Low/High text values can set 	
Matrix	<p>This question type is obsolete, please use Multi-Topics instead</p>	
Multi-Topics	<p>User selects from a specified list of values for a specified list of</p>	

topics.

User can enter either a date or a time answer

- Can be set to either accept date or time value

Date Time

(PDA Only) User can count various items

Counters

(PDA Only) User can measure using a stopwatch the time it takes to complete items

Stopper

Expression
Non-Visible question. You can enter an expression/computation that will be evaluated when the survey reaches this question.

Empty
Question without an answer. Used to display some text to the user without requiring him to answer.

How much time do you spend:

Watching TV

 Eating

 Working

 0-5 hours/day
 6-10 hours/day
 > 11 hours/day

When did you arrive at the shop?

☒ 10/ 2/2005
 October, 2005

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

 Today: 10/2/2005

Please count the following:

Cars

 Dec ...
 Reset

Please measure the time it takes for the truck to pass the green line:

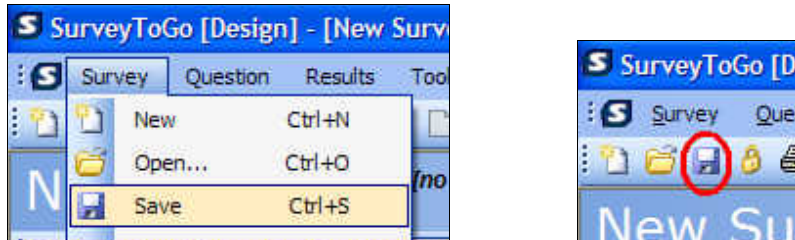
Truck 00:00:00.00

(Read out loud):

Welcome to the annual satisfaction survey, please spend a few moments to answer our survey. Press Next to continue.

Saving the survey

Once you are done designing the survey or during your work, you can save the survey by clicking the Survey > Save menu option or using the toolbar button:



You can then choose the location in the server where you would like to save the survey and give it a name.

Survey Modes – Getting the survey to your PDA

Your survey starts off in draft mode, which means the survey is not synchronized to your device. Once you are done designing the survey and you want to be able to synchronize the survey to the PDA you will need to change the survey mode to either Test or Production mode. Simply move the Survey Mode as shown here:



You can switch survey modes at any time. Here is a short description of the various modes:

Mode	Description	Synchronized to device?
Draft	Survey design mode. Survey is NOT synchronized to device.	No
Test	Survey is synchronized to device, survey results are marked as test	YES
Production	Survey is synchronized to device, survey results are marked as live	YES
Closed	When you need to retire a survey you can move it the closed mode.	NO

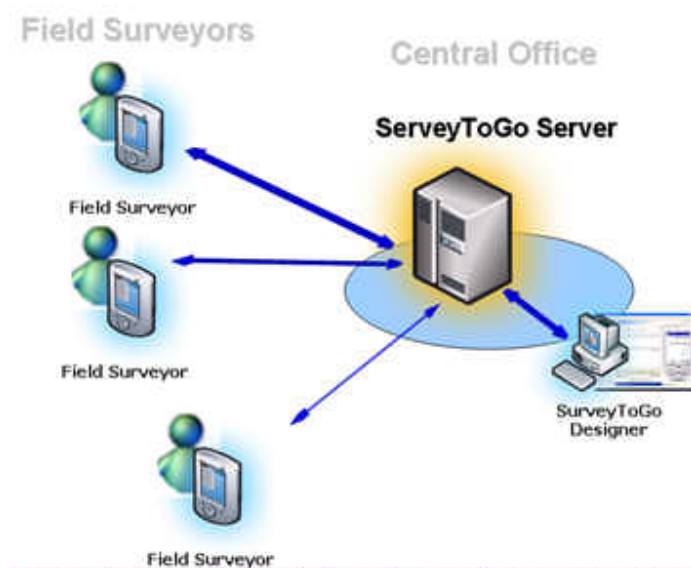
Note: Both Test and Production mode surveys are synchronized to your device. The difference between the modes is that in Test mode your results will be marked with a

special flag so that you know you are in test mode. Please see the start of this chapter for more info about survey modes.

Chapter 3 - Managing a PDA Survey

Typical PDA Scenario

When using SurveyToGo with a mobile work force on the field for data collection a typical scenario will be:

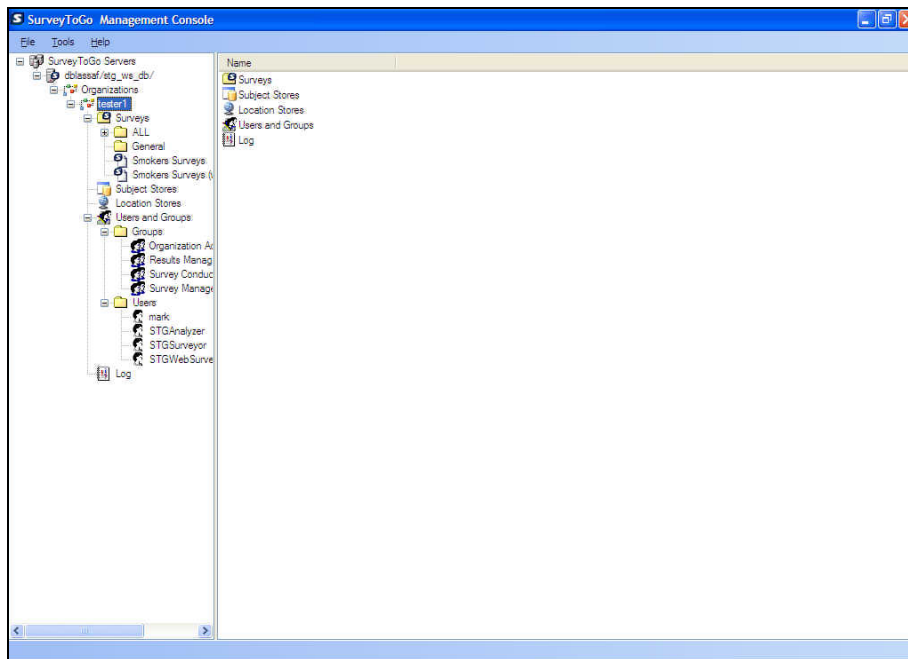


In this scenario, a number of field surveyors are used to collect the data. Each of the field surveyors can have a number of surveys assigned to him and sends his results back to the SurveyToGo Server for processing.

In this scenario, after creating the relevant surveys, the Survey Manager application is used to both create new surveyors and to assign the surveys to the various field surveyors or groups. When the field surveyors synchronize their devices, their updated survey package will include the surveys assigned to them.

The Survey Manager Console

The Survey Manager Console (Start > Programs > Dooblo SurveyToGo > Survey Manager) is a special application designed to let you manage your field data collection operations:



Using the Survey Manager you can easily do any of the following:

- Add additional surveyors & groups of surveyors to your organization
- Assign different surveyors/groups to different surveys
- Use the operations console to get a "who did what when" report of any survey with the ability to change the data for any result.

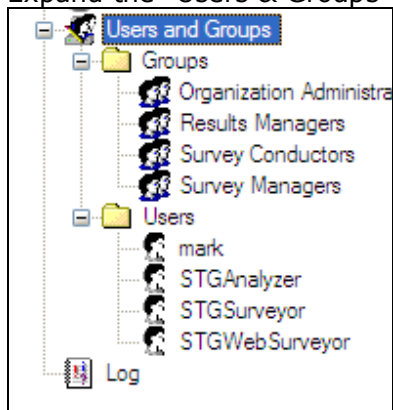
Managing Surveyor users & groups

In SurveyToGo, everyone is a user. It doesn't matter if you are a survey designer, a surveyor or a manager – in order to login you will need a user. In addition, users can be put into groups and thus make life a little bit easier in terms of assigning surveys to groups instead of individual surveyors.

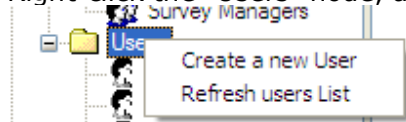
Adding Users

In order to add a user to the system:

1. Expand the "Users & Groups" node:



2. Right-click the "Users" node, and select "Create new user":



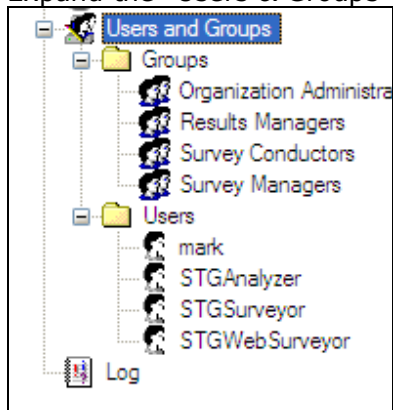
3. Enter the relevant details and click the "Create" button.

From now on, this user is ready for use.

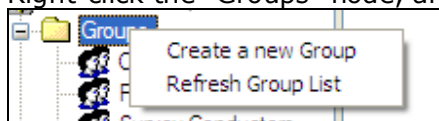
Adding groups

SurveyToGo has some predefined groups built-in, however you are free to add as many groups as you need to. To add a group:

1. Expand the "Users & Groups" node:



2. Right-click the "Groups" node, and select "Create new group":



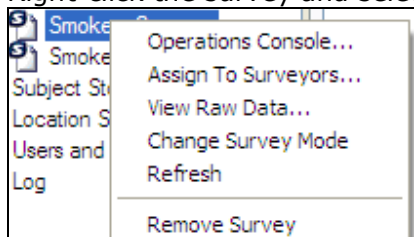
3. Enter the relevant details and add the relevant group members and click the "Create" button.

Assigning the survey to surveyors or groups

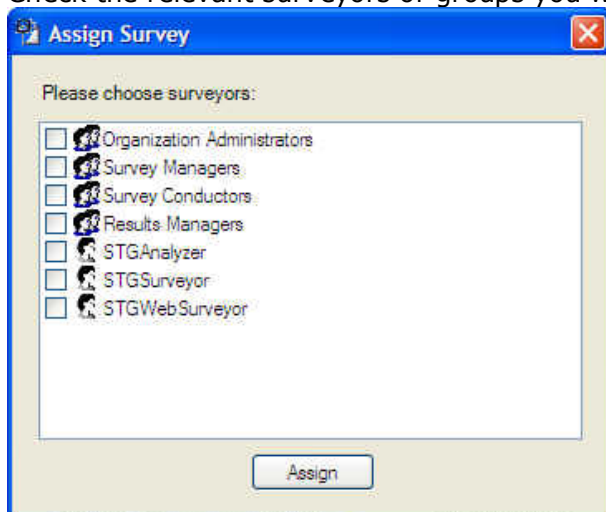
By default, once you switch a survey to test/production mode it is automatically assigned to the user who created the survey. However, you can assign the same survey to other surveyors/group of surveyors.

To assign the survey to a surveyor or a group of surveyors follow these steps:

1. Expand the Surveys node and locate the relevant survey.
2. Right-click the survey and select the "Assign to Surveyors" menu item:



3. Check the relevant surveyors or groups you want to assign to:



4. Click the "Assign" button

The "Operations Console" – Who did what when?

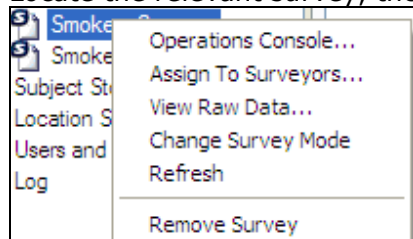
SurveyToGo includes an operations console that enables you to

- get a clear "Who did what when" picture of your survey
- View the data for each of the results
- Change the status of results, and then change the data of the results.
- Add comments
- Assign results back to the PDA
- View result attachments

You can open the Operations Console both for a specific survey and for all your surveys. If you open the Operations Console for a specific survey, only that specific survey results will be shown. If you open the Operations Console for the entire Surveys node, you will see results for all surveys.

To open the Operations Console:

1. Locate the relevant survey, then right click:



2. Click "Operations Console":

Observation ID	Test	Survey Name	Surveyor	Location	Location ID	Current Status	Round	Submit Time	ScenarioName
750	<input checked="" type="checkbox"/>	Smoke Surveys	mark			Approved		15/06/2008 10:59	
751	<input checked="" type="checkbox"/>	Smoke Surveys	mark			Approved		15/06/2008 11:00	
752	<input type="checkbox"/>	Smoke Surveys	mark			Requires Approval		15/06/2008 11:09	

This screen shows you all the results for the relevant survey for the period set in the "Start / End date".

If you double click any of the results row, you will see the actual result data:

The screenshot shows a window titled "Observation: 750. (Test)". It has three tabs: "Data", "Attachments", and "History". The "Data" tab is active, displaying a form with the following fields:

- Status: Approved
- Start: 15/06/2008 10:59:27
- Location: (dropdown menu)
- Subject ID: 750
- End: 15/06/2008 10:59:47
- Uploaded: 15/06/2008 11:11:15

Below these fields is a table with two columns: "Question" and "Answer".

Question	Answer
(1) [qu_001] What is your gender?	Male
(2) [qu_002] What is your age?	25-40 years old
(3) [qu_003] What is your name?	John
(4) [qu_004] Have you ever smoked a cigarette?	Yes
(5) [qu_005] On average, how many cigarette packs do yo...	1
(6) [qu_006] What would you do if you find out your childre...	Take them to a rehabili...
(7) [qu_007] What is your general opinion on smoking?	None

To the right of the table are two text areas labeled "Surveyor Comment:" and "Review Comment:". At the bottom of the window, there are two dropdown menus: "Change status to:" (set to "Approved") and "Change Mode:" (set to "Test"). Below these is a "Comment:" text box and "OK" and "Cancel" buttons.

From this screen you can view the data and attachments of this survey result, and change the status and mode of this survey result.

Please note that in "Approved" mode, the data is read only. To change the data you will need to change the mode from "Approved" to "Pending Approval", then click the OK and re-open the result. To get more information about the "Approved" status and how to apply a non-auto-approve mode for your survey, please read on.

Configuring a survey to not "auto-approve" results

By default, surveys are set to work in "Auto-Approve" mode. This means that survey results are automatically marked as approved once they are uploaded to the server.

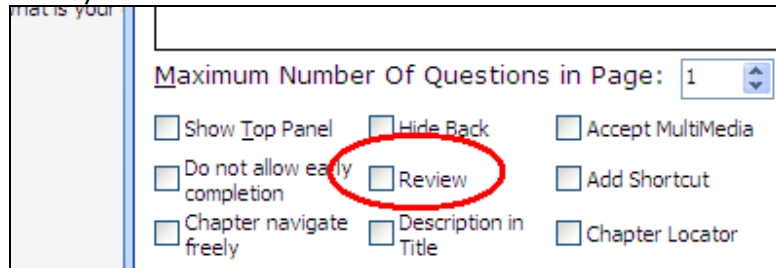
Why would you want to change this behavior?

An example might be that you need to hand out survey results to your customers, and you want to employ some quality assurance on the actual survey results and only export the results that you have marked as "Approved". You can easily do that by marking the Survey as not to auto-approve, and then use the operations console to go over "Pending Approval" results, and approve the ones you find appropriate.

To change this:

1. Open the Survey Designer application (Start > Programs > Dooblo SurveyToGo > Survey Designer)

2. In the Survey properties screen, check the "Review" checkbox & save the survey:

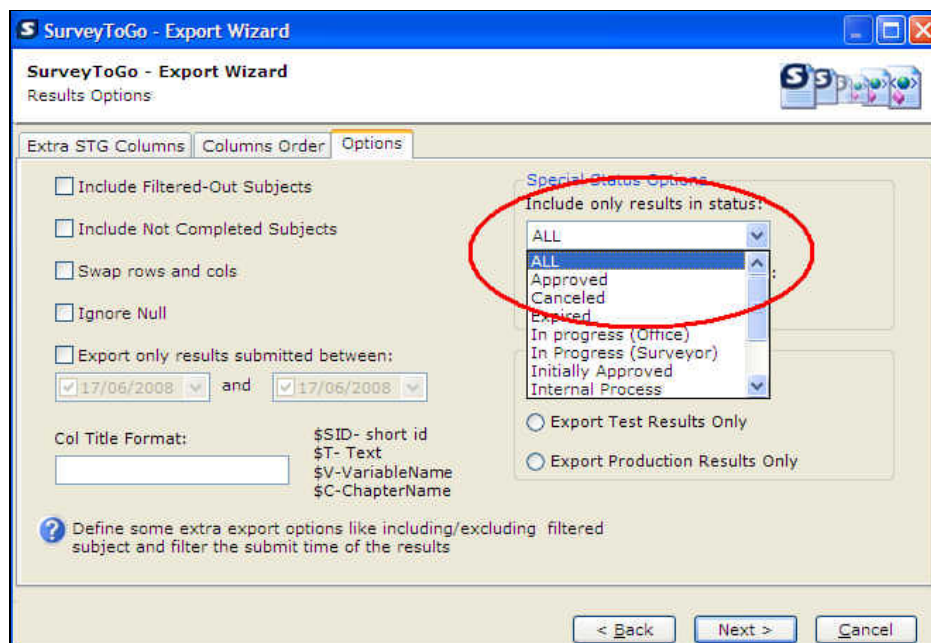


Maximum Number Of Questions in Page: 1

☐ Show Top Panel ☐ Hide Back ☐ Accept MultiMedia
☐ Do not allow early completion ☒ Review ☐ Add Shortcut
☐ Chapter navigate freely ☐ Description in Title ☐ Chapter Locator

Exporting only "approved" results

If you need to only export the approved results, simply go through the regular export wizard and in the last step click the "Options" tab and select the status you want to export:



SurveyToGo - Export Wizard

Results Options

Extra STG Columns Columns Order **Options**

☐ Include Filtered-Out Subjects
☐ Include Not Completed Subjects
☐ Swap rows and cols
☐ Ignore Null
☐ Export only results submitted between:
 17/06/2008 and 17/06/2008

Col Title Format: \$SID- short id, \$T- Text, \$V-VariableName, \$C-ChapterName

Special Status Options

Include only results in status:

ALL, Approved, Canceled, Expired, In progress (Office), In Progress (Surveyor), Initially Approved, Internal Process

☐ Export Test Results Only
☐ Export Production Results Only

Define some extra export options like including/excluding filtered subject and filter the submit time of the results

< Back Next > Cancel

Chapter 4 – Taking pictures/recording sounds through the PDA

About attaching files to the running surveys

SurveyToGo is enabled by default to accept any file that is created during the survey as an attachment to the running survey result. Because of this, any pictures that you take during the survey or any sounds that you record during the survey are automatically attached to the current survey result and will be sent along with the result to the server.

How to make it happen

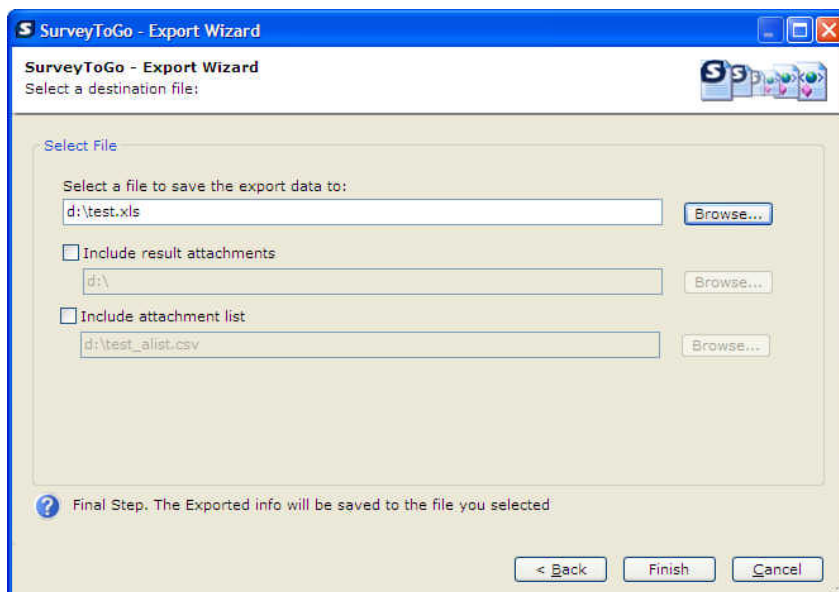
Configuring the survey to accept pictures/sounds is very easy. Simply add an empty question where you instruct the surveyor to take a picture. Then, the surveyor should activate the regular camera:

1. Create your survey.
2. Add an "Empty" question to the survey. You can add text like this: "Please use your camera to take a picture now". (you can add any text you like).
3. Save & Seal the survey (Survey > Seal).
4. Sync your device.

Now, once the survey is running, you can take a picture using your built-in camera. Just click the relevant hardware button on your PDA to start up the camera and take the picture. Any picture that you take while you are in a survey is automatically bound to that survey result. After you finish photographing, close your camera application and you should be back in SurveyToGo. Continue running the survey normally and once you synchronize the results back to the server, the pictures are synced with the results.

How to export the attached pictures/sounds

In the last screen of the export wizard, you can specify the folder for the attachments



Option	Description
Export Data File	This is the file name that will be filled with all the results according to your selection
Include result attachments	If you specify this option and select a folder location, any picture attachment that was included in the results will be placed in this folder. The name of the picture will be according to the relevant SubjectID field in the results file.
Include attachment list	If checked, you can choose a csv file that will receive a list of links to the various pictures that were included in the results. This is useful if you need links to the attachments instead of the actual pictures.

Chapter 5 – Showing pictures & media on the PDA

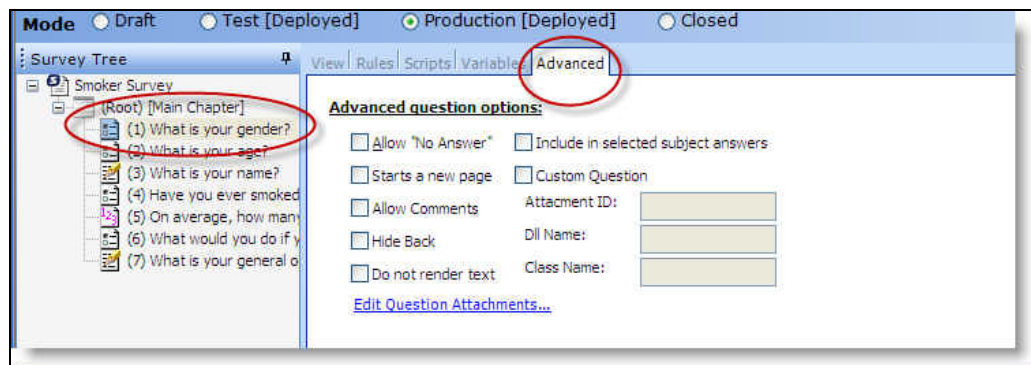
About Showing pictures & media on the PDA

SurveyToGo enables you to attach a picture or any other media content, like Word files, sounds, videos etc.. to a specific question of a survey and then enables the surveyor to view that content while he/she is on the relevant question. This is very useful for when you need to show a picture of a product and then ask questions about it.

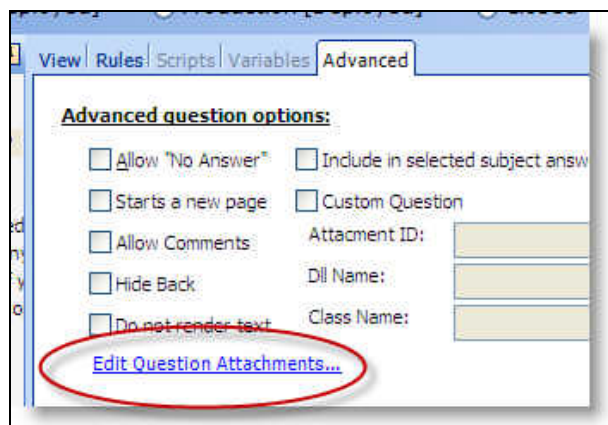
How to do it?

To add content to a question:

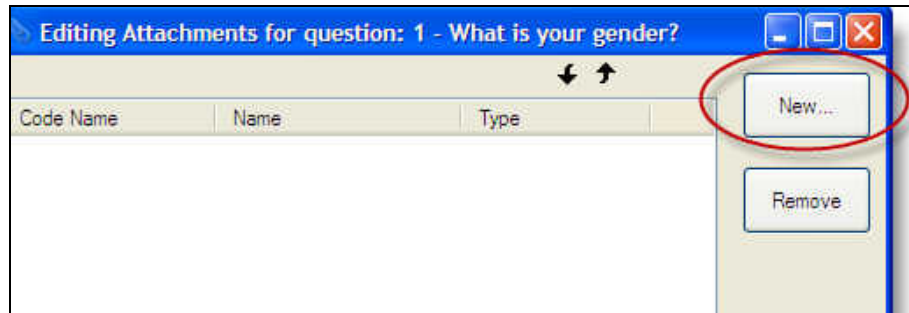
1. Open up SurveyToGo Designer
2. Select the relevant question and switch to the Advanced tab:



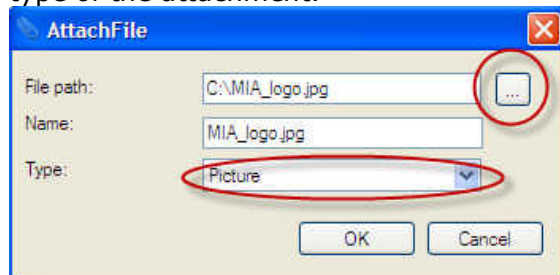
3. Click the "Edit Question Attachments" link:



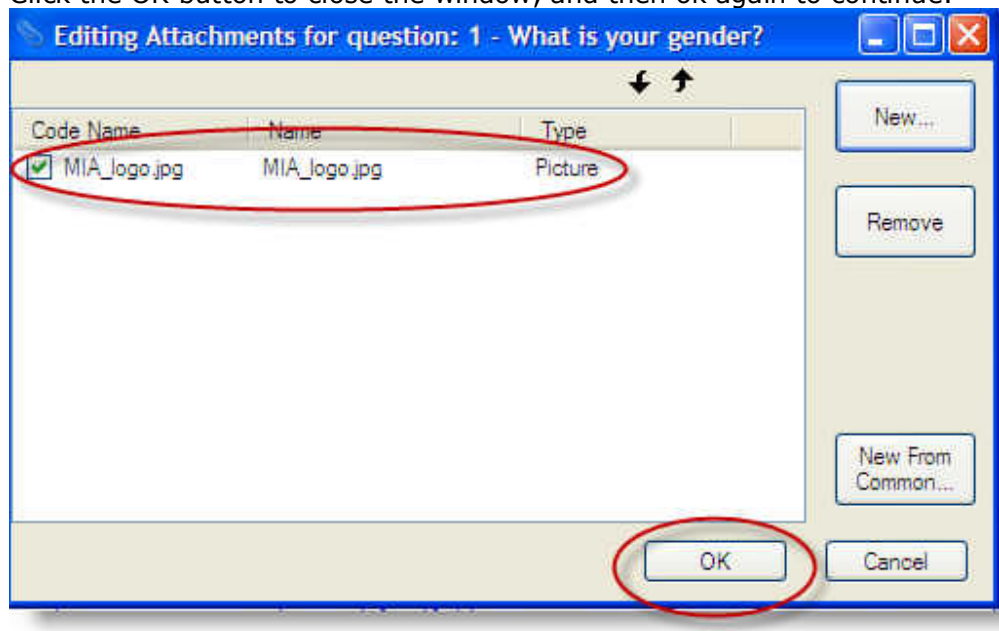
4. You will then see the question attachments screen from which you can either select a previous loaded attachment or add a new one. To add a new one, click the "New" button:



5. Click the "..." button to select the file you want to attach and also select the type of the attachment:




6. Click the OK button to close the window, and then ok again to continue:



7. That's it. Save and deploy the survey.

Viewing the attachment on the device

Once you have configured the picture attachment, simply open the survey on your device. Once you reach the relevant question, you will see a small  "attachment" icon on the toolbar. Tapping on the icon will show you the relevant picture:



Clicking on the attachment icon will bring up the attachment viewer. If you attached more than one attachment you will see arrow icons on the bottom that allow you to navigate through the attachments.

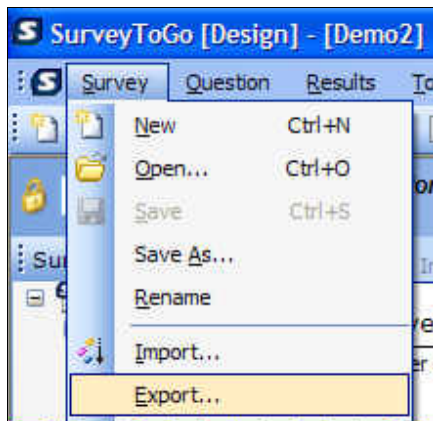
Chapter 6 – Exporting & Printing

About Exporting & Printing

SurveyToGo enables you to export the data of a survey at any point, to a number of different applications & formats. Furthermore, additional export providers can be written easily to support additional formats. Currently, the supported formats include MS Excel, MS Access, SPSS & XML. When exporting, you have complete control on the order of the exported columns, enabling you to separate the way the survey is presented from the way the data is to be exported.

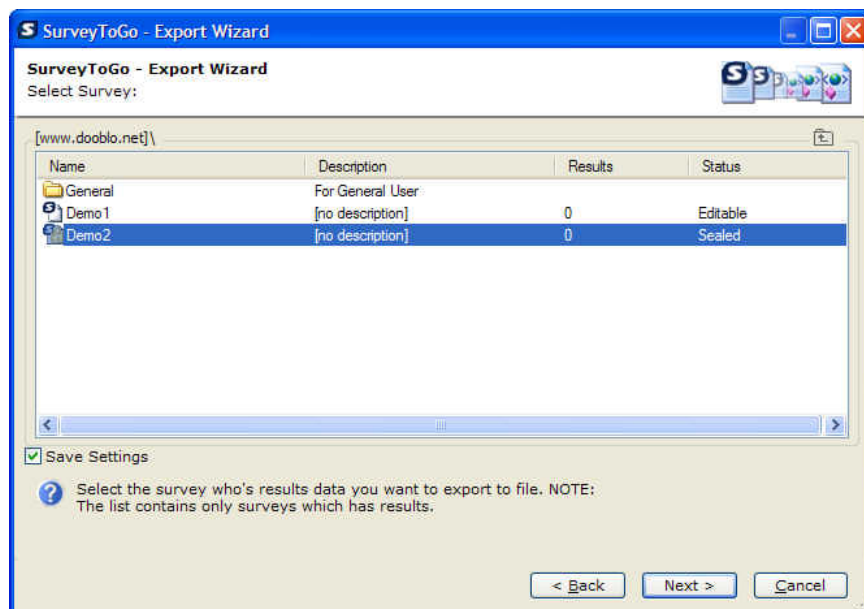
The Export Wizard

Whenever you wish to export the data of the survey, you choose the Survey > Export menu option, then choose: Export Results:



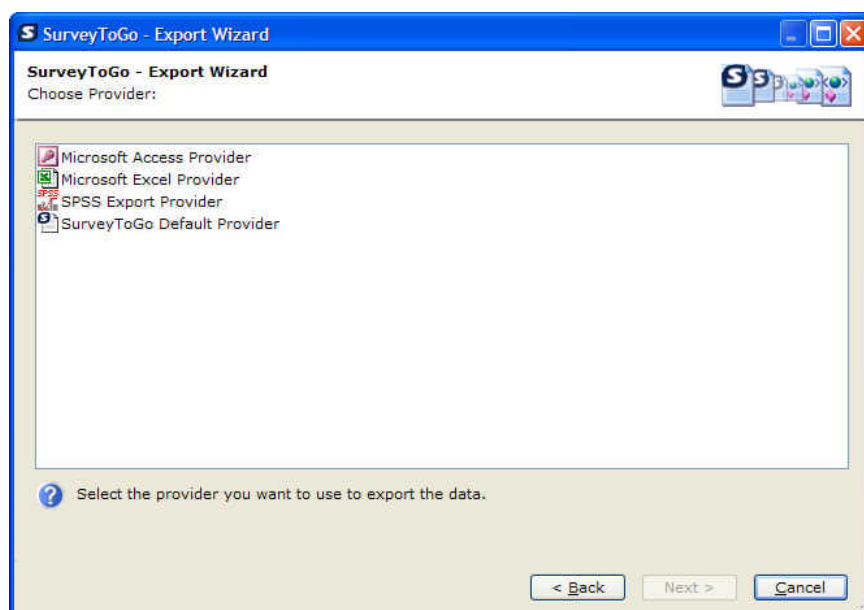
The Export Wizard will show and start to ask you a series of settings needed to perform the export process:

Survey select screen



In this screen, simply select the survey who's results you would like to export and click Next:

Export provider screen



Simply select the desired export provider and click the Next button.

Export options screen

Option	Description
Index	Column name of a running index of the subject.
Surveyor Name	Column name of the surveyor that created the result. For PDA surveys, this will hold the actual surveyor name, while in WEB surveys, the surveyor name will STGWebSurveyor.
Restrict to SPSS format limits	When checked, column names will be shortened to support older versions of SPSS that only supported 8 character column names.
Surveyor Comment	Column name of the surveyor comment written by the surveyor while on the field.
Subject Name	Column name of the subject name. The subject name is taken either from the relevant subject store the subject is a part of, or Anonymous for anonymous subjects.
Subject Unique Tag	Column name of the unique subject tag. The unique subject tag is taken from the definition in the subject store, or the email for non-store subjects.
Upload Date	Column name of the upload data/time. The upload date/time is the date/time that the result was uploaded to the server by the PDA, or submitted to the server in Web surveys.
Duration	Column name of the duration. The duration specifies the time it took for the subject to reach the end of the survey from the moment the survey was started.

Execution Date	Column name of the execution date/time. The execution date/time is the time the subject performed the survey. This date/time can differ dramatically from the upload time of the result for PDA surveys, while for WEB surveys the execution and upload date/times tend to be very close to each other.
Subject Data	Column name of the subject data. The subject data is a custom optional data associated with the subject during the course of the survey that is mostly used as a way to send (and later retrieve) specific subject data while using an anonymous survey. For more information on the Subject Data field, please refer to Chapter 6.

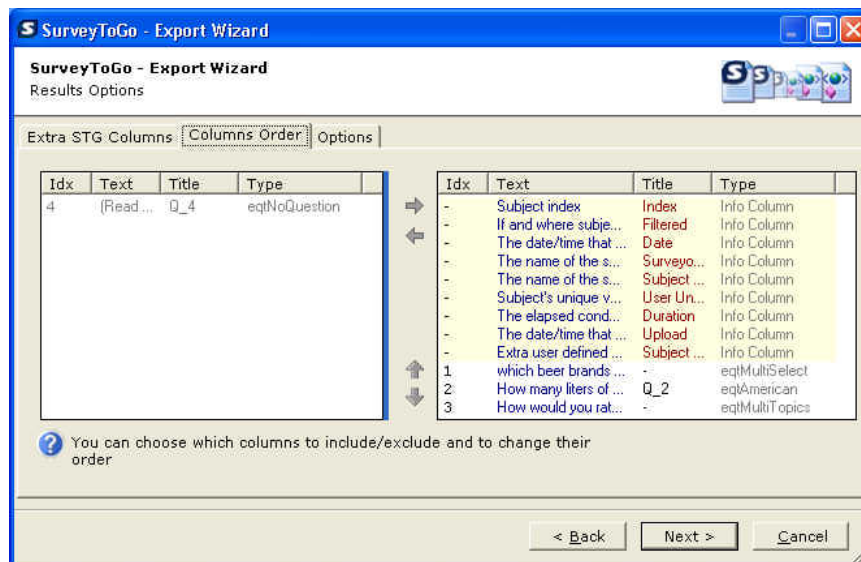
When done you can either click the columns order tab to change the columns order settings, or click Next to continue.

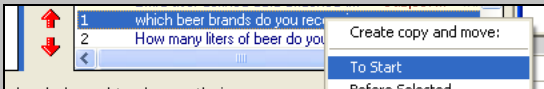
Columns Order screen

The columns order screen allows you to define the exact order of the columns you would like to have when exporting the survey results. You can choose to export all or only a subset of the columns available, or even export a column more than once. Both the left list and the right list support multiple selections (by using the Shift and or Control keys) and are completely sort able by any column you desire.

When you are done configuring the order and number of columns you need to export, simply click the options tab or click Next to continue the export process.

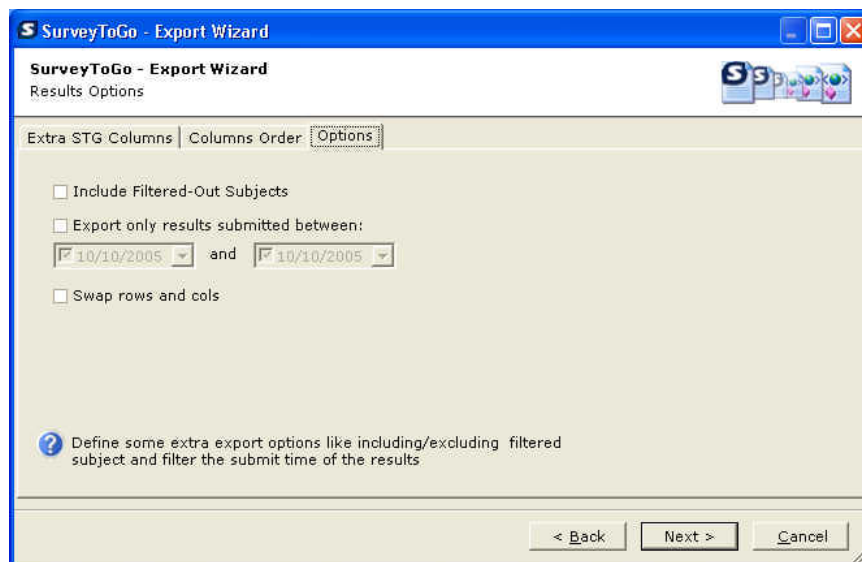
Note: export settings are saved on your computer for the when you need to export the same survey again.



Option	Description
Left list – Source columns	<p>Contains all the available columns. You can select one or more columns from this list to move to the output columns list. Internal columns, like the 'duration' column etc have a yellow background while survey specific columns have a white background. The list supports multiple selections & sorting. To sort, simply click the column of the list you would like to sort by. Contains all the columns that will be included in the output export file. The order of the columns is the actual order of the exported file. To change the order of the columns you can press the up/down arrows. To create a copy of a column, right click that column:</p> 
Right list – output columns	
Up/down buttons	
Left/right buttons	<p>Control the actual order of the columns. You can select either one or more columns and press the up down buttons to move these columns up or down.</p> <p>Control the movement of columns between the left and right list.</p>

Options screen

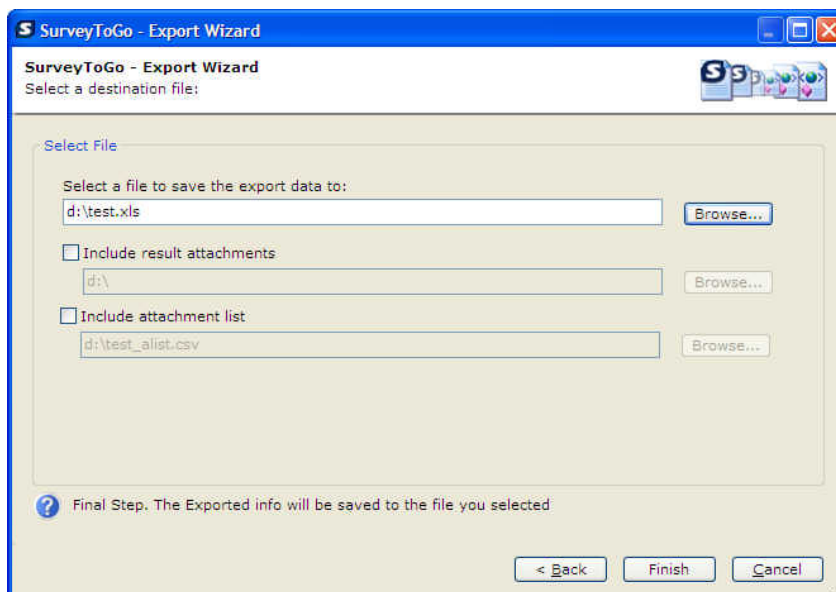
The options screen allows you to specify some general options regarding the exported file. When you are done, simply click the Next button to continue.



Option	Description
Include Filtered Out subjects	Subjects who participate in your survey can be filtered out from the survey due to certain conditions. If checked filtered out subjects will also be included in the exported file, and an additional column – "Filter" is added to the exported data. The "Filter" column contains the index of the question the subject was filtered at.
Export only results submitted between... and ...	Enables you to specify a date range for the exported results. If specified, only results from the specified range are included in the export.
Swap rows and cols	If checked, the results are exported so that each subject is a column, and each question is a row, instead of the regular format where each subject is a row and each question is a column.

File name selection screen

The file name selection screen allows you to enter the name of the output file name. When you are done, click the finish button to continue.



Option	Description
Export Data File	This is the file name that will be filled with all the results according to your selection
Include result attachments	If you specify this option and select a folder location, any picture attachment that was included in the results will be placed in this folder. The name of the picture will be according to the relevant

Include attachment list

SubjectID field in the results file.
If checked, you can choose a csv file that will receive a list of links to the various pictures that were included in the results. This is useful if you need links to the attachments instead of the actual pictures.

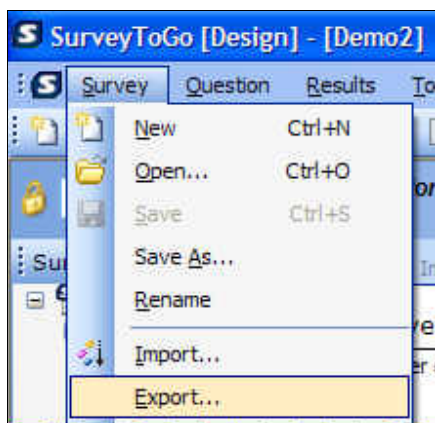
After you click the finish button, you will see the following screen:

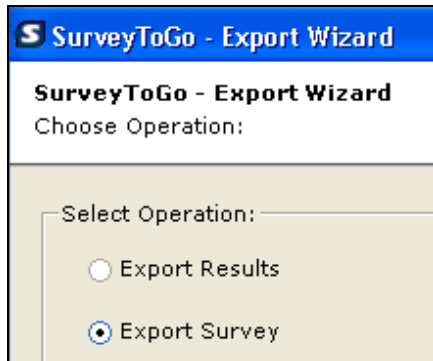


Answer Yes to open the exported file using its associated application, or no to continue without opening the external application.

Exporting the survey (not the results)

Sometimes there comes a need to export the actual survey structure. This can include backup purposes, moving a survey from one SurveyToGo server to another one and more. To export a survey to XML, simply choose "Survey > Export" then choose Export Survey:





SurveyToGo - Export Wizard

SurveyToGo - Export Wizard

Choose Operation:

Select Operation:

☐ Export Results

☒ Export Survey

Choose the survey you would like to export, and click Next:



SurveyToGo - Export Wizard

SurveyToGo - Export Wizard

Select Survey:

[www.dooblo.net]\Simple Surveys\

Name	Description
Beer Event Survey	[no description]

Choose the default SurveyToGo export provider and click Next:



SurveyToGo - Export Wizard

SurveyToGo - Export Wizard

Choose Provider:

SurveyToGo Default Provider

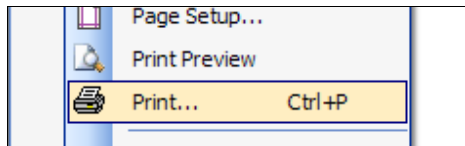
Then choose a file name and click the finish button. The survey will be saved to the path you indicated.

Printing

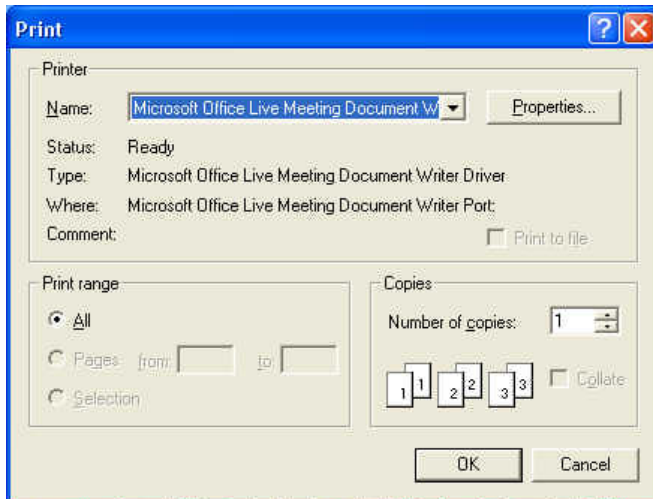
Printing a survey can be very useful for both keeping a hard copy version of the survey & for sending to clients & team members for review. You can both directly print a survey or perform a print preview.

Direct Printing

To directly print a survey in SurveyToGo, choose the "Survey > Print" menu option:

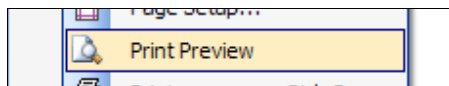


Then choose the printer you desire from the standard printer selection screen and press OK to print:



Print Preview

To preview a survey before printing, select the "Survey > Print Preview" menu option:



Then the print preview screen will show, allowing you to preview the output before printing:

Print preview

Close

Page

Smokers Updated - Dooblo SurveyToGo

1. (Read out loud to the subject):

Hi there, we are conducting a survey to understand people's smoking habits.

I would appreciate it if you could spend a few moments answering this survey.

2. Do you smoke?

Please do not tick the checkboxes unless you are sure (only one answer allowed)

1. Yes

2. No

Question	Answer	Score
1. Do you smoke?	Yes	1

3. How many cigarettes do you smoke (daily):

The number should be in the range of 0 and 100

4. How many cigarette packs do you buy weekly?

The number should be in the range of 0 and 100

Smokers Updated - Dooblo SurveyToGo - Page 1

Chapter 7 - Rules

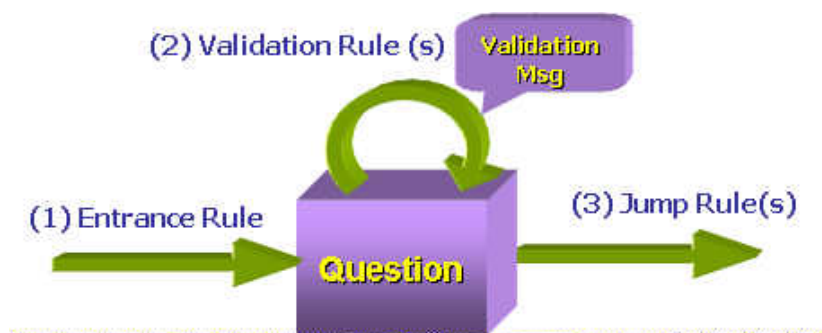
About Rules

The general flow of a survey calls for showing the survey questions one by one (or page by page) until the end of the survey is reached:



General flow of survey, for single-question-per-page

The flow of a survey can be manipulated to behave differently than the general flow. To control the flow of the survey, you can use rules. The rules model supported in SurveyToGo is composed of:



Entrance Rule

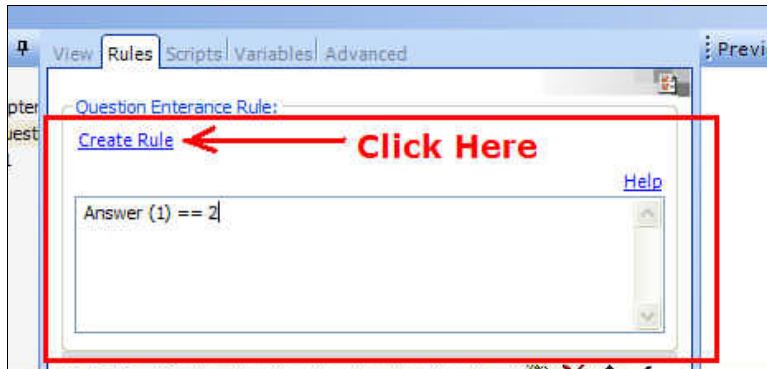
The entrance rule controls whether or not the question will be visible (entered) in the survey. The entrance rule is composed out of an expression that is evaluated during the course of the survey. If the expression evaluates to true, the question is shown, otherwise, the question is not shown. An empty entrance rule is treated as a true expression and the question is shown.

The entrance rule can be written for either questions or chapters and act the same way. If a chapter entrance rule equals to false, the whole chapter is not shown, including all of its questions.

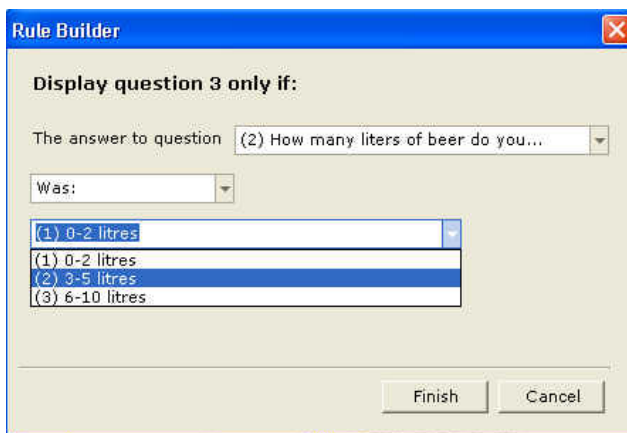
Writing the entrance rule

You can either build an entrance rule with the help of the Entrance Rule Wizard, or choose to write the entrance rule yourself. Using the wizard has some limitations which are not present when writing the rule without the wizard. It will prove extremely worthwhile to learn to write rules without the wizard.

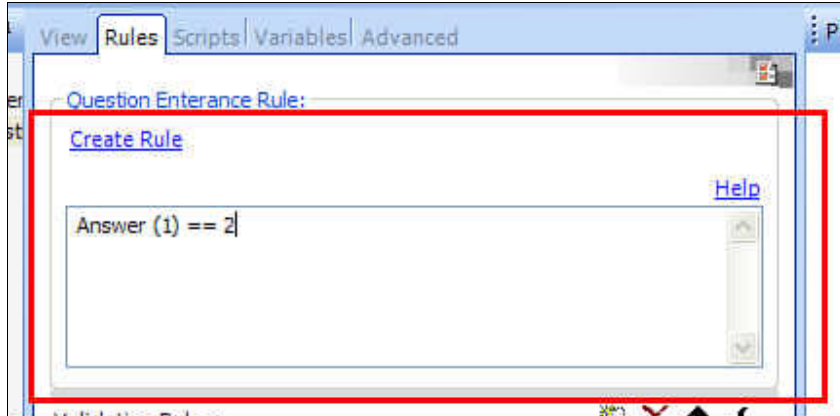
To use the wizard, simply click the "Create Rule" link:



You will be then led by a series of questions where you specify the entrance rule properties:



To write an entrance rule to a question, switch to the rules tab of the question details pane, and write the entrance rule in the top text box:



The entrance rule can be a simple statement, however, you can also write extremely advanced and complicated entrance rules. The entrance rule is virtually unlimited in terms of flexibility. To learn more about the actual syntax for writing rules please see Chapter 7.

Validation Rules

To clarify the role of validation rules let's consider the following survey for an example of the need for validation rules:

[Question 1]: "How many people are in your car?"

[Question 2]: "Of those, how many are your best friends?"

It is very obvious that if one answers 4 to the first question, he cannot answer more than this to the second question. We have a need to check the validity of the second answer in relation to the first answer. This is where validation rules come in handy.

The validation rule controls whether the answer to the question is valid. The validation rule is composed of a condition and a validation message. The condition is evaluated during the course of the survey. If the condition evaluates to true, the survey will not continue and the associated validation message will be shown next to the question.

In our example, we will add this validation rule to question 2:

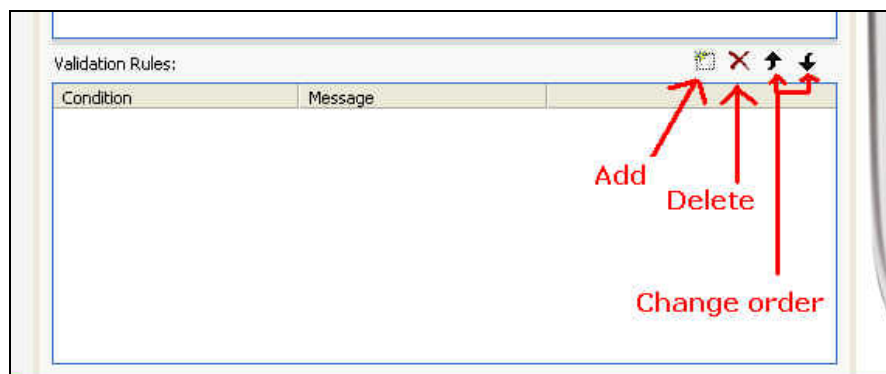
[condition] Answer to this question > Answer to the first question?

[message] "Number of Best friends in the car cannot be more than passengers!"

If we add this validation rule to question 2, when reached SurveyToGo will check the condition, and if it is true, the message will be shown and the survey will not continue to the next question.

Writing validation rules

To add one or more validation rules to a question, switch to the rules tab of the question details pane, and use the validation rules section listbox:



Click the "Add" icon to add a new validation rule and a validation message. You can add more than one validation rule.

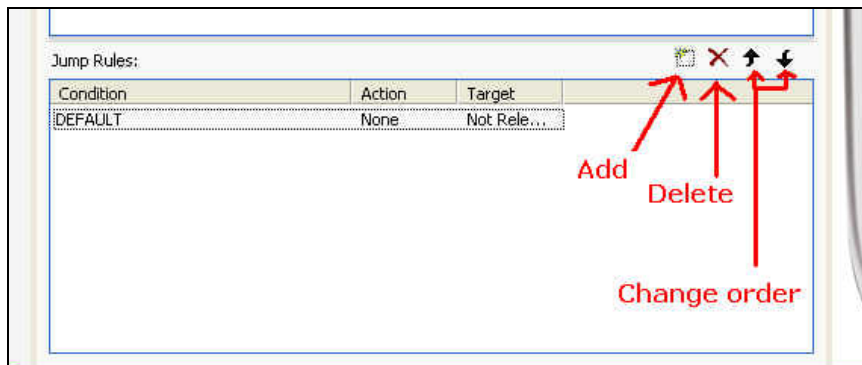
Jump Rules

The jump rule controls what action will be taken after the subject answers a specified question. Jump rules are composed out of a condition and an action. After the question is answered, the question jump rules are evaluated. If a jump rule's condition evaluates to true, the specified action will take place. Actions include:

Action	Description
Cancel	Cancel the survey. The current results are lost.
Filter	Filter-out the subject. The result will contain the current question in the Filter column if the "Include Filtered out Subjects" option is selected in the export options.
Go to index	Jumps directly to the question that is specified as the "Target".
Next	Continues to the next question. This is the default flow of the survey.
Submit	Submits the current survey without reaching the end of the survey.
Go to Chapter	Jumps directly to the chapter that is specified as the "Target".

Writing jump rules

To add one or more jump rules to a question, switch to the rules tab of the question details pane, and use the jump rules section list box:



Click the "Add" icon to add a new jump rule and action. You can add more than one jump rule to each question.

Chapter 8 – Start/End Scripts

About Scripts

A script is a set of one or more user written instructions that form a block of instructions for SurveyToGo to process. You can write question start/end scripts and chapter start/end scripts. Common usage for scripts can be a script that initializes certain question texts based on the answers of previous questions. You can write a question-start-script that sets the current question text to include answers from previous questions.

Question Start/End scripts

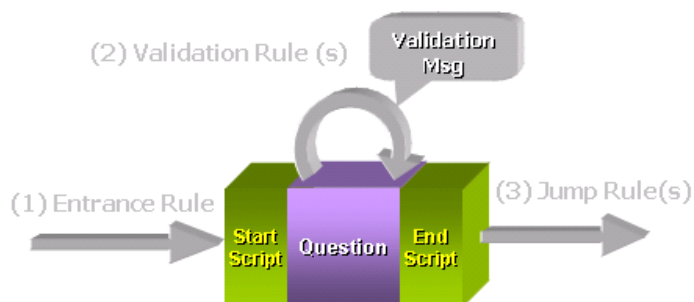
Questions support start/end scripts. The question-start-script is executed whenever the page containing the question is shown. The question-end-script is executed when the subject leaves the page containing the question.

Chapter Start/End Scripts

Chapters also support start/end scripts. The chapter-start-script is executed when the first question of that chapter is shown. The chapter-end-script is executed when the subject leaves the chapter (before the first question of the next chapter is shown). Chapter start-end scripts are smart enough to handle situations of jumping into the middle of a chapter, and jumping out of a chapter to a different chapter.

Relationship between scripts and rules

Scripts and rules co-exist and collaborate to give you complete control over the flow of the questions and chapter. The diagram below shows the logical relationship between rules and scripts.

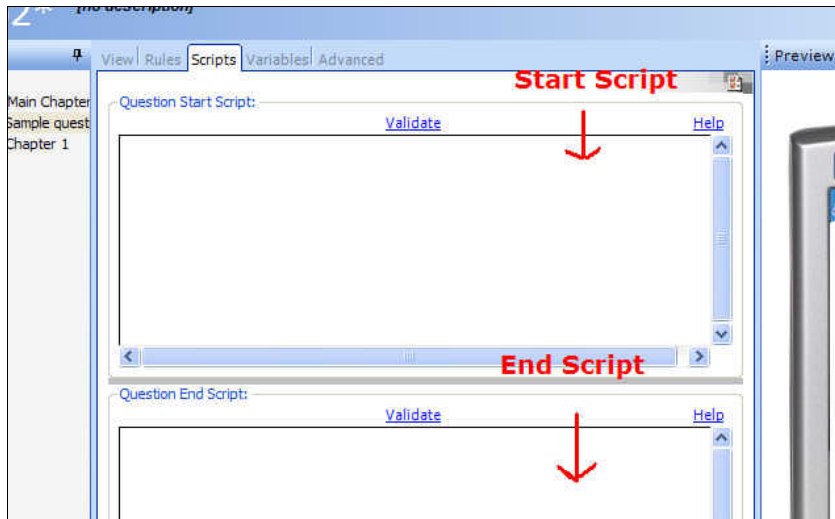


Rules are shown in gray while scripts are shown in green.

As you can see, the start-script is executed after the entrance rule has determined the question should be shown. The end-script is executed after the answer has been validated by the validation rule and right before the jump rule takes place.

Writing start/end scripts

To write start/end scripts you simply select the question/chapter and switch to the "Scripts" tab.



The syntax for writing start/end scripts is the same syntax as for writing expressions, survey-init-scripts etc... you can use all the functions available in SurveyToGo.

Chapter 9 – Child Surveys or running surveys from within surveys

About child surveys

SurveyToGo enables you to start a survey from within another survey. This feature can be used for a bunch of different purposes such as:

- Filling out surveys in response to conditions. For example: a survey for a retail store, that requires a different survey if the store was close.
- Filling out surveys in response to events in the field. For example: general medical device survey, where if while filling out the general questions, the patient suddenly reacts you need to fill out a survey about his/her reaction then continue back to filling the general survey.
- Simple loops.

Each child survey is rendered as a menu option on the device allowing for quick ad-hoc filling of child surveys.

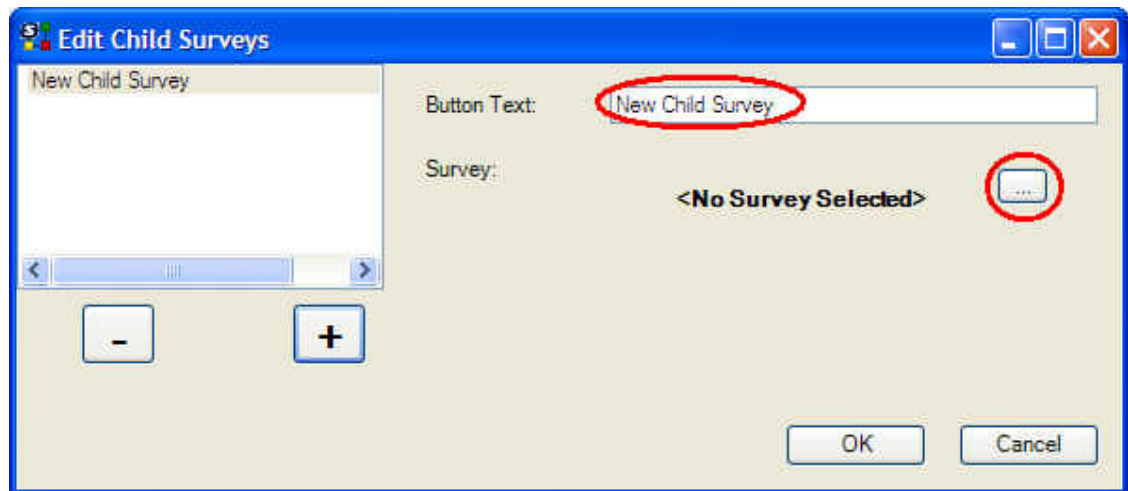
How to make it happen?

In order to configure child surveys for a father survey, you just need to specify for the master survey which survey(s) are its child surveys. To accomplish this, do the following:

1. Open the main survey.
2. Click the "Edit Child Surveys" link on the advanced tab of the survey node:



3. Click the "+" button to add a new child survey, then fill out the "Button Text" text. This text will be shown on the menu of the device:



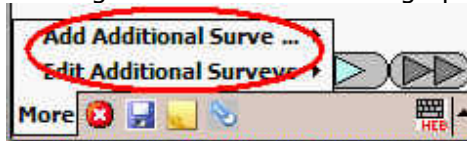
4. Then, click the "..." button to select the actual child survey from your existing surveys. Please note you can select any survey you want, and you can have a survey be a child survey of more than 1 parent.
5. Click the "+" button to add more surveys or the "OK" button to finish.
6. That's it. You can now deploy the survey to the device and on the device you will see a menu

Working with child surveys on the device

Now, on the device when running the survey you will see a menu named "More":



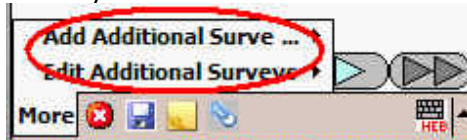
Clicking on this menu will bring up the ability to add or edit child surveys:



You can then select the relevant child survey from the list of surveys. This will start a new run of the child survey, after which you will return to the current survey. To edit surveys you have already conducted tap the "Edit Additional Surveys" menu option, and then select the relevant survey.

How to change the "Data" field of child surveys for later editing?

When you choose to edit additional surveys from the device by clicking the option:



You will see a screen that lists out the various child surveys you have filled out. For example:

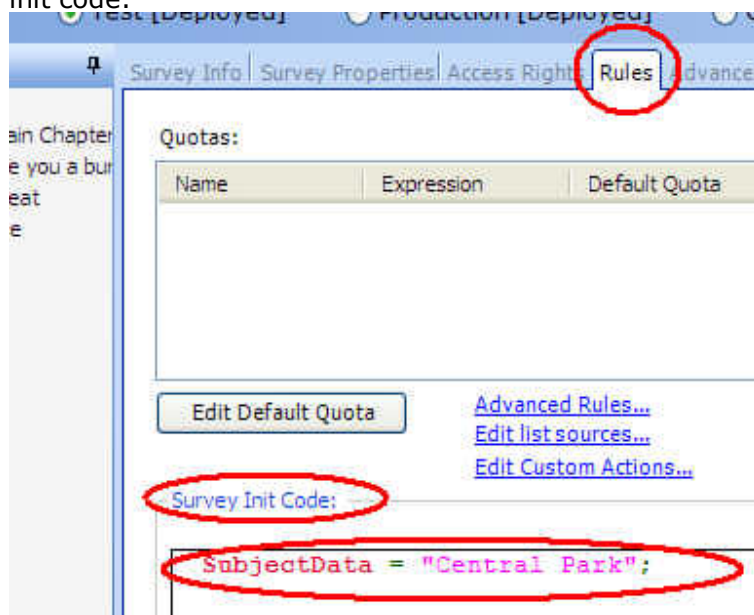
Additional Results			
Name	ID	Time	Data
Sample...	11	02:53...	
Bunny ...	12	02:54...	Central Park
Edit Close			

Column	Description
Name	Name of the child survey
ID	Internal ID

Time	The time when you have started the child survey run
Data	Additional data that can be associated with the child survey run.

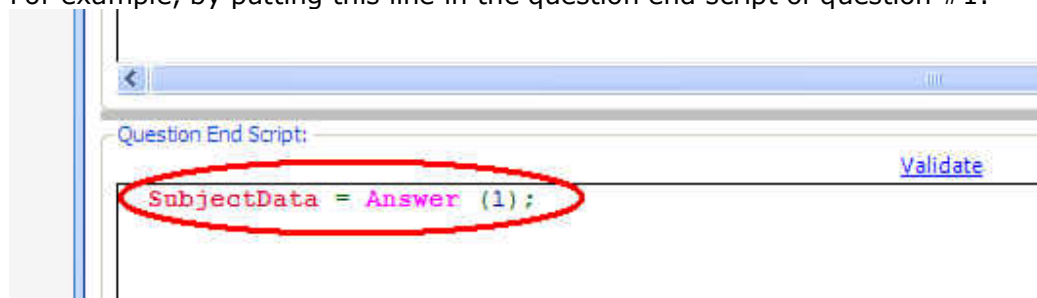
The "Data" field can be used to specify whatever data you might want to associate with the child survey run. This can be an answer to one of the child survey questions, a static text or what ever you choose. You can change the text that will be shown on this field by interacting with the "SubjectData" variable in the survey designer. To change the text content of this field:

1. Open the child survey in the survey designer
2. In the Rules tab of the main survey node, add the following text in the survey init code:



3. Save and deploy the survey.
4. You will now see "Central Park" as the "Data" field of all the child surveys.

Please note you can interact with the "SubjectData" variable anywhere in the questionnaire, including Expression questions, start/end question scripts etc.. For example, by putting this line in the question end script of question #1:



You can have the "Data" field showing the answer of question #1 of the child survey.

Chapter 10 – Quota Management

About Quota Management

SurveyToGo includes quota management for both Web and PDA surveys. Quota management is the ability to control the desired amount of survey results based on various properties. To clarify the need for quota and quota management lets consider the following PDA survey conducted by a single field surveyor:

[Question 1]: "What is your gender? (Male/Female)"

[Question 2]: "What is your weekly salary?"

Lets say for the sake of our example, that we would like to collect a minimum of 20 male responses and 20 female responses. How can we make sure field surveyor will survey the correct amount of male and female subjects?

We can of course instruct the field surveyor to collect 20 male and 20 female respondents, however, this method of quota management is inefficient and can become nearly impossible to implement as quota demands become increasingly complicated and distributed. This is where the built-in quota management of SurveyToGo comes in handy.

The PDA Quota Management Mechanism

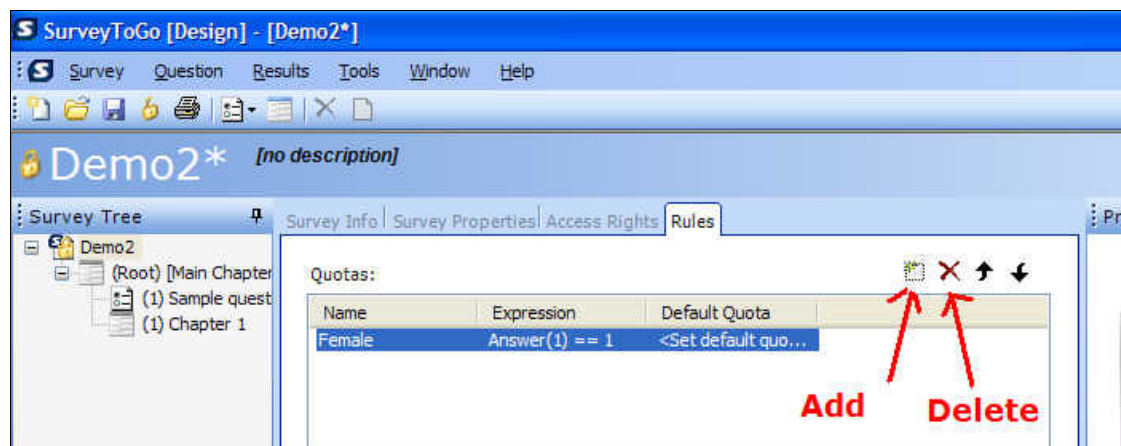
Quota management for the PDA is composed out of a series of quota expressions, and for each field surveyor you define his/her individual limits of the various expressions.

Quota Expressions

Quota expressions have names and a corresponding expression that defines the name. In our example, we will have the following quota expressions:

Quota Name	Quota Expression
"Female Subjects"	"Answer (1) == 1" - the answer to question 1 was equal to 1 (female)
"Male Subjects"	"Answer (1) == 2" - the answer to question1 was equal to 2 (male)

To enter the above quota definitions into the survey, select the Survey Node from the tree, and click the Rules tab, then use the add button to add the 2 quota definitions:

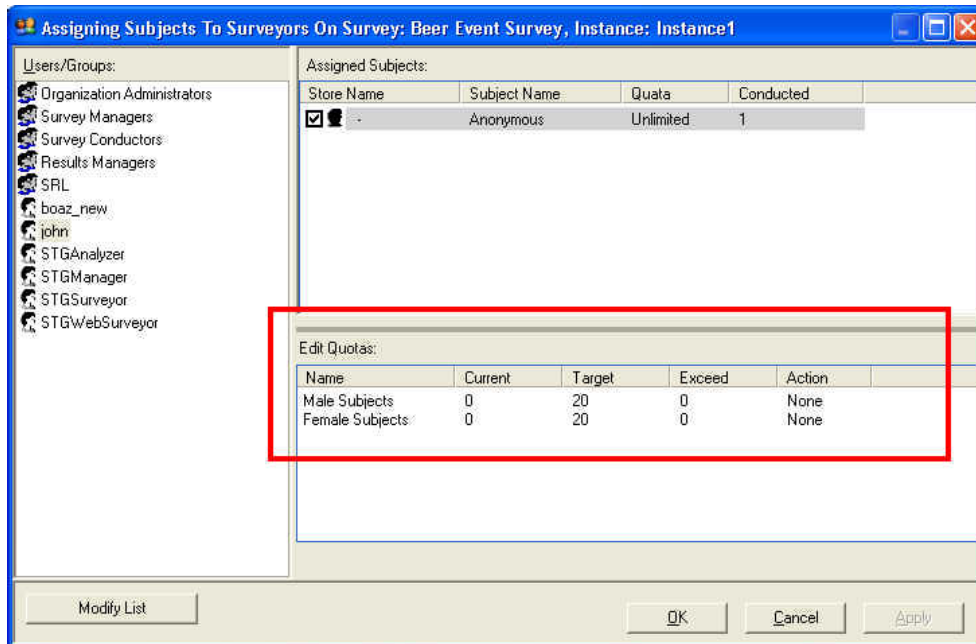


You can also set the default quota amount that assigned surveys will receive by setting the "Default Quota" column.

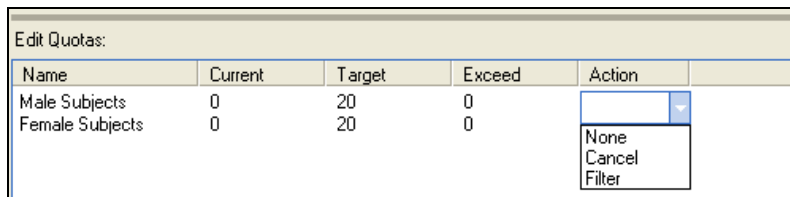
Quota assignment to surveyors

Once the quotas of the survey are defined, it is time to assign the specific quotas to the individual surveyors that are assigned to this survey. For more information regarding assigning surveyors to surveys, please refer to Chapter 3.

Once you bring up the surveyor assignment screen (Survey > Assign > Surveyors), you will notice a new setting appears, the quota settings:



This setting controls for each individual assigned surveyor, the actual amount of subjects he is to collect, for each of the quotas defined earlier. To change the various settings, simply click on the desired setting, and enter the value you desire:



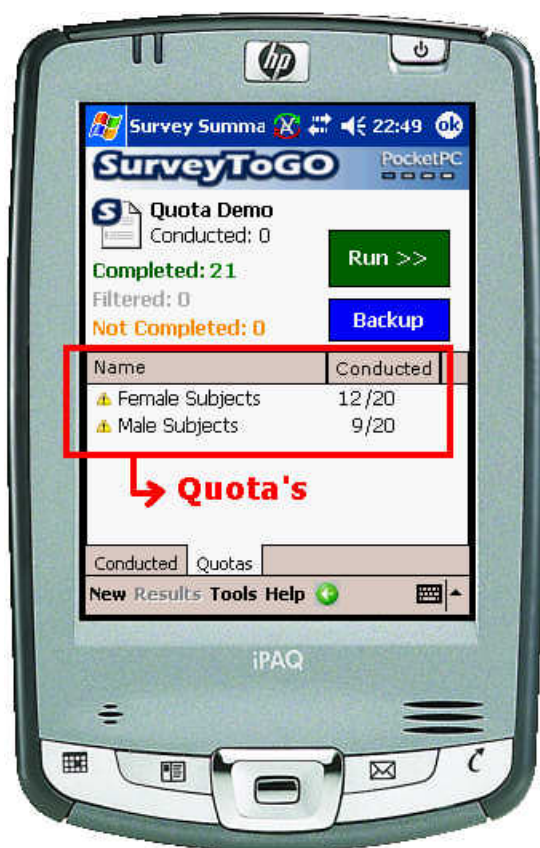
Setting	Description
Name	[read only] This is the name of the quota as defined in the Survey Properties Rules tab.
Current	The current status of this quota for the specific surveyor. The current status is updated as the surveyor synchronizes his device.
Target	Target quota for this quota. In our example, 20 male and 20 female subjects.
Exceed	By how many subjects do you allow the surveyor to exceed the target quota. For example, if you need minimum of 20 subjects for the current quota, but can use 24 subjects as well, you can set the target to 20, and the exceed to 4. If you need exactly the target quota of subjects, set exceed to 0.
Action	Indicates the action to take if the surveyor exceeds the target quota + the exceed setting. This action will take place as soon as the survey engine recognizes the exceeding subject. Available actions:

- **None** – Do not do anything when an exceeding subject is detected.
- **Cancel** – As soon as an exceeding subject is detected, cancel the current subject result.
- **Filter** – As soon as an exceeding subject is detected, filter-out the subject.

The surveyor quota configuration is a part of the package that is sent to the device when the surveyor synchronizes his device.

Surveyor quota view

The surveyor can view at all times the current status of his quotas. The surveyor can easily figure out how many subjects he needs to conduct from each quota. The survey engine in the PDA updates this quota status according to the survey results.



Chapter 11 – Assigning Surveyors to Specific Subjects

Overview

Sometimes there is a need for running a survey at a specific location or on a specific customer – and thus there is a need for the surveyor to prior to starting the survey, first select where the survey is performed or who the survey is performed on. For example:

- You are running a survey at pre defined locations of retail stores, and you need to assign different surveyors to different branches.
- You are running a survey for a pre defined list of customers, and you need to assign different surveyors to conduct the survey at different specific customers.

The subject-store mechanism was designed exactly for this. This mechanism generates a different screen on the device which forces the surveyor to first select a subject and only then tap the "Run" button:



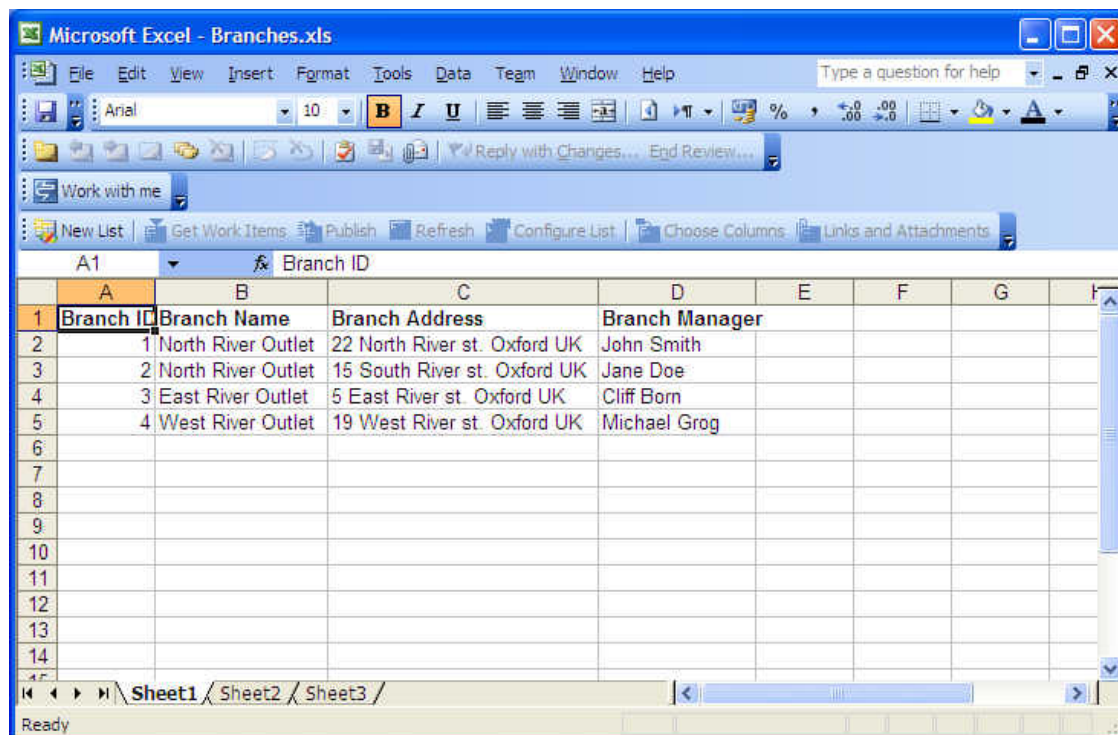
How to make it happen?

Working with subject stores is composed out of the following steps:

1. Create a subject store
2. Assign subjects from the subject store to the different surveyors.

Step 1: Creating a subject store

To create a subject store, first create an excel file that includes the location or customer data. For example, here is a sample sheet that includes retail store branch data:



The screenshot shows a Microsoft Excel window titled "Microsoft Excel - Branches.xls". The spreadsheet has four columns: "Branch ID", "Branch Name", "Branch Address", and "Branch Manager". The data is as follows:

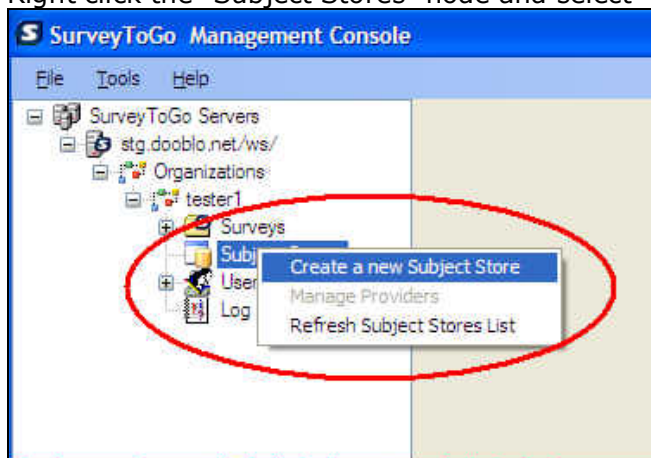
Branch ID	Branch Name	Branch Address	Branch Manager
1	North River Outlet	22 North River st. Oxford UK	John Smith
2	North River Outlet	15 South River st. Oxford UK	Jane Doe
3	East River Outlet	5 East River st. Oxford UK	Cliff Born
4	West River Outlet	19 West River st. Oxford UK	Michael Grog

Make sure to have one column that includes the "ID" text and one column that includes the "name" text in it, otherwise the creation of the subject store will be a bit harder.

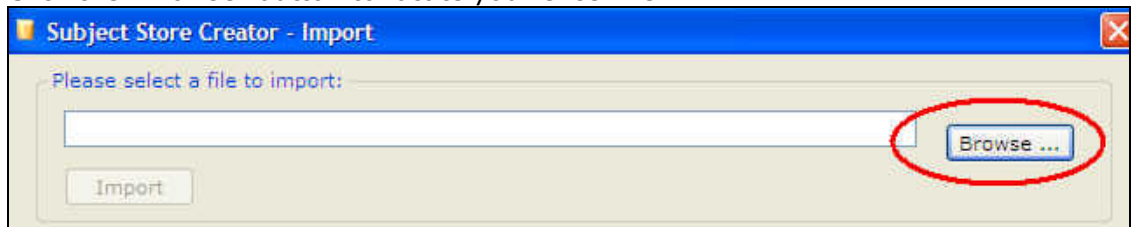
After you have prepared an excel file, you can follow these steps:

1. Open the Survey Manager application (Start > Programs > Dooblo SurveyToGo > Survey Manager)

2. Right click the "Subject Stores" node and select "Create new subject store":



3. Click the "Browse" button to locate your excel file:



4. Then click the Import button to load the excel file to the wizard. Notice the columns from your excel file will show up:

Please select a file to import:

Define the table fields properties:

Name	Code Name	Field Type	Notify Fi...	Is User Tag	Is Name
<input checked="" type="checkbox"/> Branch ID	Branch_ID	Number	0	True	False
<input checked="" type="checkbox"/> Branch Name	Branch_Name	String	0	False	True
<input checked="" type="checkbox"/> Branch Address	Branch_Address	String	0	False	False
<input checked="" type="checkbox"/> Branch Manager	Branch_Manager	String	0	False	False

Please specify Subject Store name:

Subject Store Name: Description:

***** Important:** Please note that the column that has the "ID" text in it (Branch ID) is marked as "User tag". Also, the column that has the "Name" text in it (Branch Name) is marked as "Is Name". If these are the incorrect columns, please click on the column and remove the special tagging and put it on other columns.

- Then, give the store a name that will identify it and a description and click the Create button:

Please specify Subject Store name:

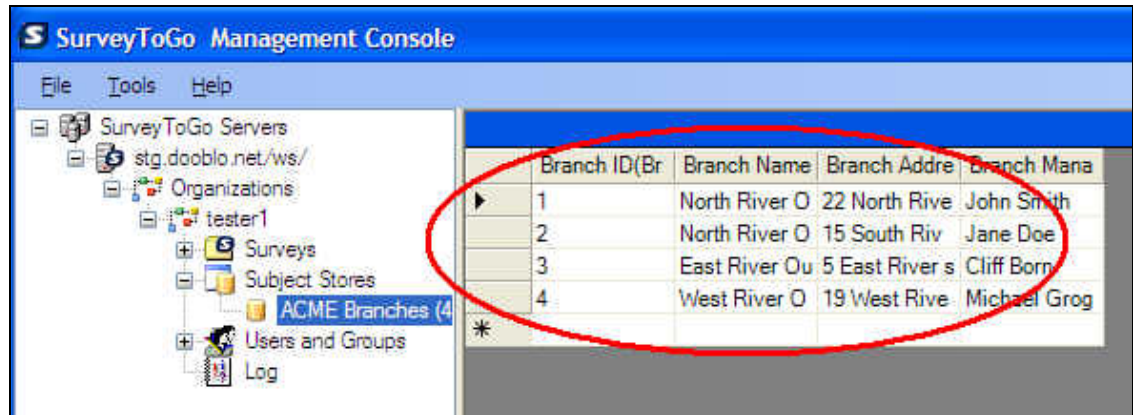
Subject Store Name: Description:

- You will see a success message:

Subject Store Creator

Store Created!

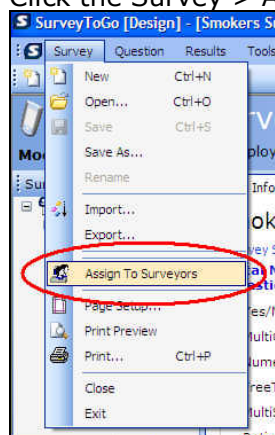
- That's it. The store is now active, you can also edit the store by clicking the store node:



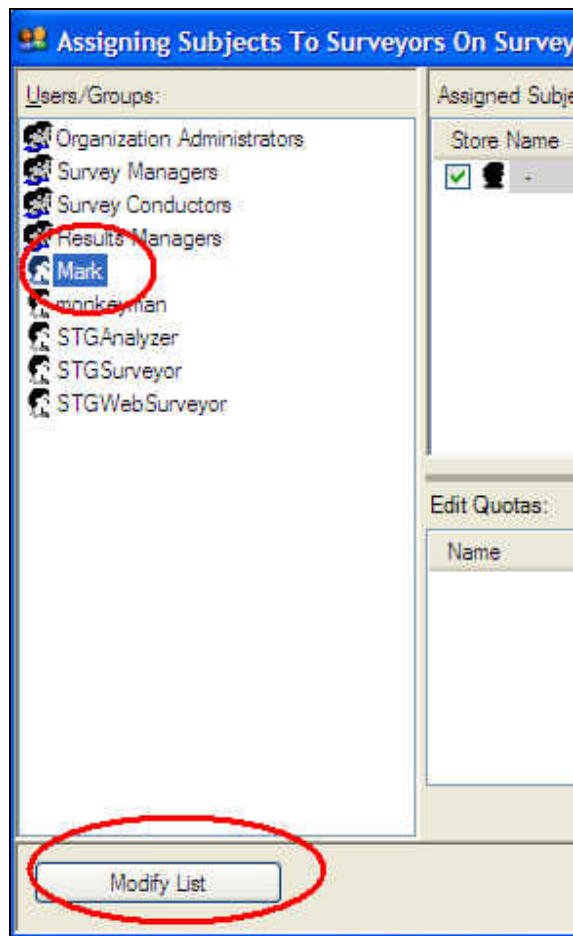
Step 2: Assign subjects from the subject store to the different surveys

To assign the subjects to the various surveyors, do the following:

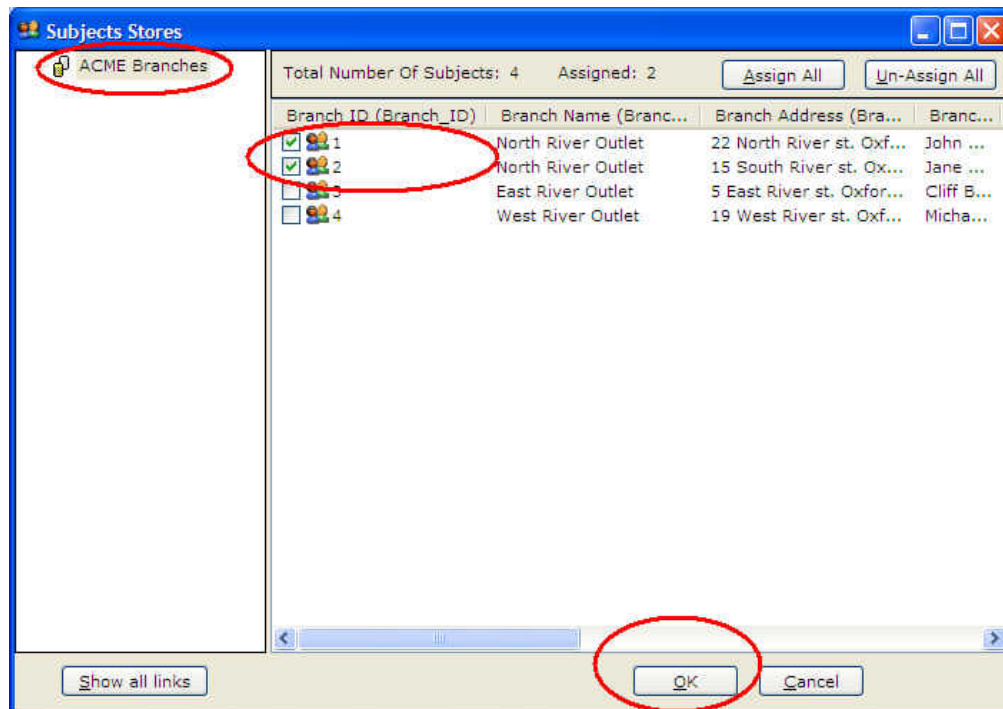
1. Open the relevant survey in the Survey Designer
2. Click the Survey > Assign to surveyors:



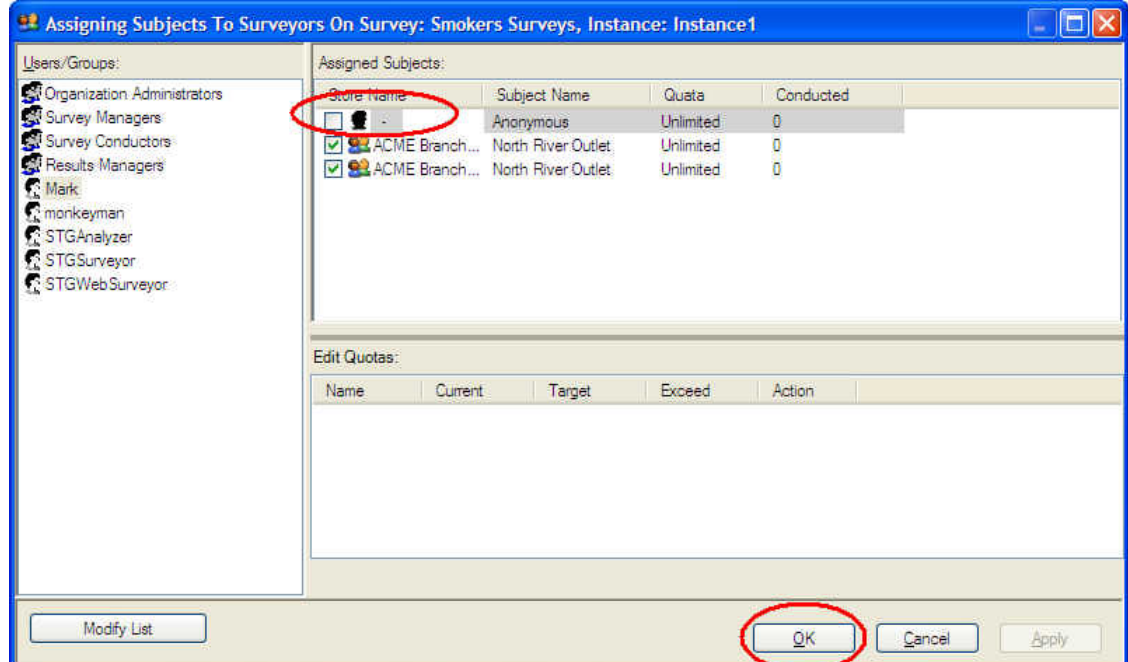
3. Select the relevant surveyor – DO NOT SELECT A GROUP – and then click the "Modify list" button:



4. This will open up the subject store selector screen, where you can select the store name, and the subjects from that store that should be assigned to this surveyor. Once you are done checking the subjects, click the OK button:



- Finally, remove the "Anonymous" check on the surveyor by un-checking the first check box, and click the OK button:



*** The reason for removing the anonymous option is so as to limit the surveyor and require him to select one of the subjects prior to tapping the

"Run" button. If the anonymous option is still selected, the surveyor WILL be able to also conduct "anonymous" surveys, ie, surveys that are not associated with any subject.

6. That's it!

How is this shown on the device?

After assigning the subjects to the surveyor, upon syncing the device the surveyor will get the subject list assigned to him and once he opens the survey, he will see a screen like the following:



This screen forces the surveyor to first click on a subject from the list, and only then will the RUN button be enabled. Notice that when exporting the results, the SubjNam field will hold the actual subject name data from the subject store:

	A	B	C	D	E	F	G
	SbjNum	Filter	Date	Srvyr	SbjNam	UsrUnq	Durtio
1	4589	-1	20/08/2008 17:46	mark	East River Outlet	3	00:00
2							
3							
4							

Chapter 12 – Answer Scales

About Answer Scales

A very useful feature of SurveyToGo is answer scales. A Scale is a set of pre-defined answers which you can then re-use throughout your survey without the need to add the same answers to different questions. The use of scales can make it easier when using scores in surveys as you can define the answer scores inside the scale avoiding the need to define the score for each individual answer in each question.

The use of answer scales is encouraged and can save you a lot of time during survey design as changing the definition of a scale immediately affects all the questions that use that scale.

Using Answer Scales

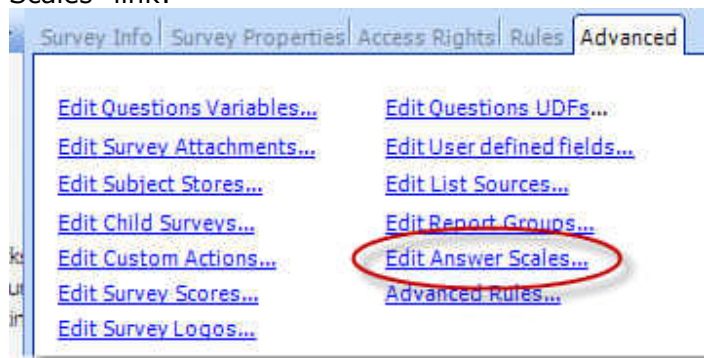
Using answer scales involves:

1. Define the scale
2. Associate the scale with the relevant questions

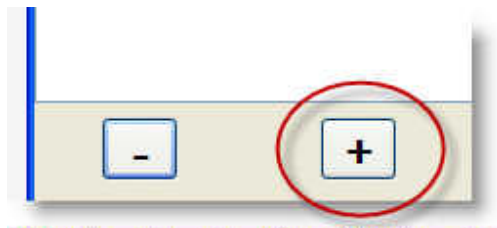
Step 1: Define a new answer scale

In order to define a new answer scale:

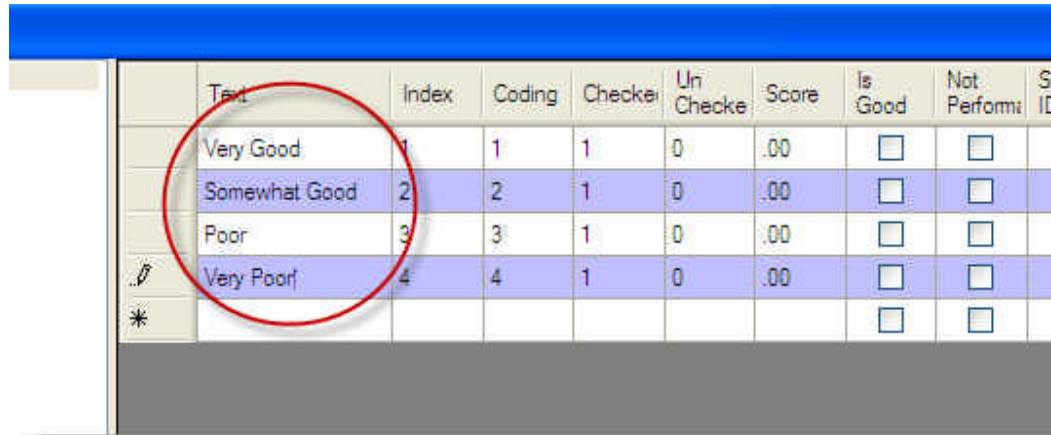
1. Switch to the "Advanced" tab of the survey node and click the "Edit Answer Scales" link:



2. Click the "+" button to create a new scale:



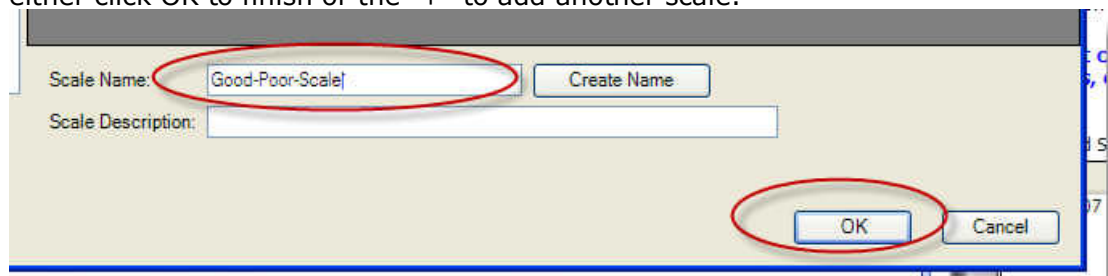
3. Enter the relevant answers in the scale grid by clicking on the "Text" cells and entering answers:



Text	Index	Coding	Checke	Un Checke	Score	Is Good	Not Performi	SI ID
Very Good	1	1	1	0	.00	<input type="checkbox"/>	<input type="checkbox"/>	
Somewhat Good	2	2	1	0	.00	<input type="checkbox"/>	<input type="checkbox"/>	
Poor	3	3	1	0	.00	<input type="checkbox"/>	<input type="checkbox"/>	
Very Poor	4	4	1	0	.00	<input type="checkbox"/>	<input type="checkbox"/>	
						<input type="checkbox"/>	<input type="checkbox"/>	

note you can set other properties other then the text as well through this screen.

4. When you are done configuring answers, enter a name for the scale and either click OK to finish or the "+" to add another scale:



Scale Name:

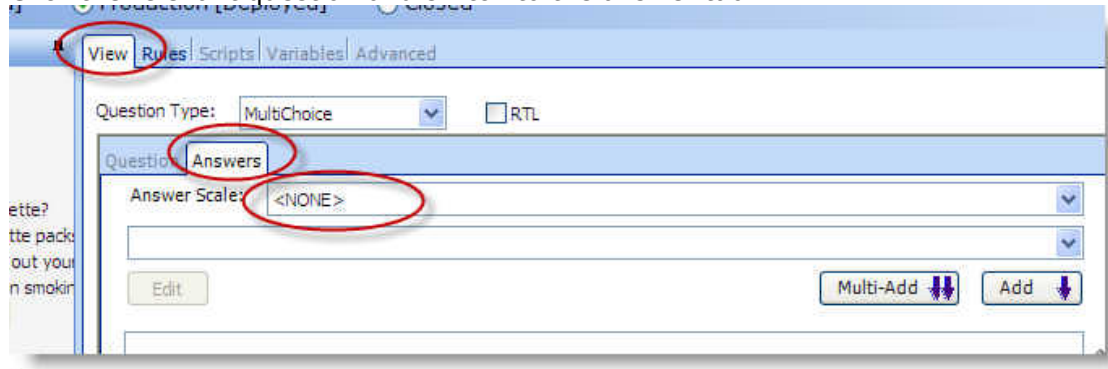
Scale Description:

** You can click the "Create Name" button to have SurveyToGo generate a name for your scale automatically.

Step 2: Associating scales with questions

In order to associate a scale with a question:

1. Click the relevant question and switch to the answer tab:



2. Select the relevant scale from the available answer scales by choosing from the scales dropdown list:



3. Notice that the answers are automatically filled once you select the scale:



Chapter 13 – Survey Scores

Scores overview

For activities such as Mystery Shopping or any other surveys that require the feature of scores, SurveyToGo includes the ability to define the weights and scores of each question and then automatically generate a final score for each survey result. This score can be viewed from the Operations Console, and will also be included when you export the survey results.

SurveyToGo includes support for one "root score" (final score) and multiple additional scores for each result. This means you can define both a "Root score" which represents the final score of the survey and also additional scores which will be included in the survey result.

How to make it work

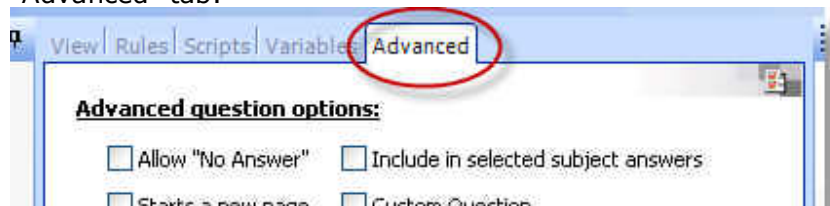
Configuring scores is easy to do, and involves the following steps:

1. Set the score for the answers of the relevant questions
2. Configure the content and weights of the "Root score"

Step 1: Setting the score for the answers of the relevant questions

You will need to set the scores of the answers for every question which participates in the final score. Setting the answer scores is easy, however, the use of answer-scales can make your life even easier as you will set the score of answers once and that score will be then used throughout the survey. To set an individual question score:

1. Click on the relevant question from the questions tree and then switch to the "Advanced" tab:



- Click on the "Answer properties" link located on the bottom:

- You will see a screen with a grid containing the answers to this question. One by one, set the score for each of the answers:

Text	Index	Variable	Coding	Checked	Un Checked	Score	Is Good
Very Good	1	A_8_1	1	1	0	100.00	
Somewhat Good	2	A_8_2	2	1	0	80.00	
Poor	3	A_8_3	3	1	0	.00	
Very Poor	4	A_8_4	4	1	0	.00	

To set the score, simply click the relevant cell and write the score.

- Once you are done with setting the scores for the answers, click the "OK" button:

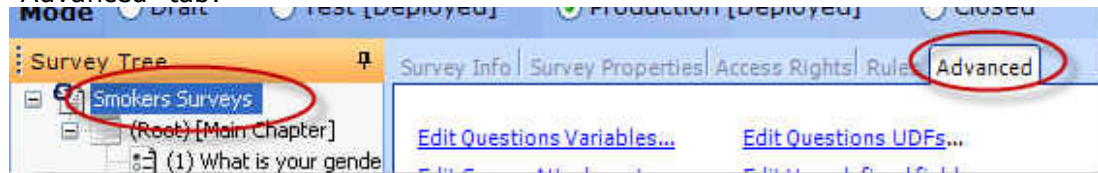
- Continue editing the other questions that you want to influence the final score of the survey.

Note: The use of answer scales allows you to configure the scores of each answer in the scale in one central place and then use that same scale multiple times throughout the survey, which can save time both in the initial survey design process and also later on when changes need to be made.

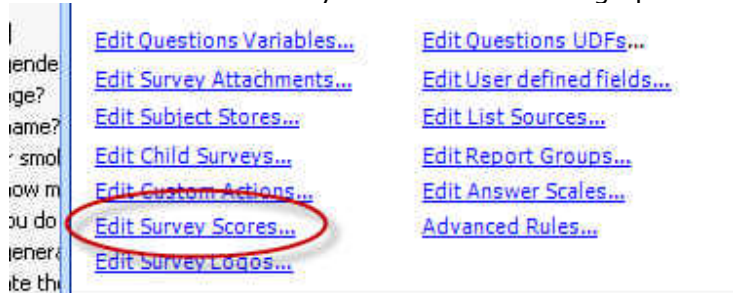
Step 2: Configuring the contents of the "Root Score"

Once all the questions and answers are properly configured, you are ready to configure the contents and weights of the "root score" (or final score) of the survey. Setting the contents of the root score can be done by following the following steps:

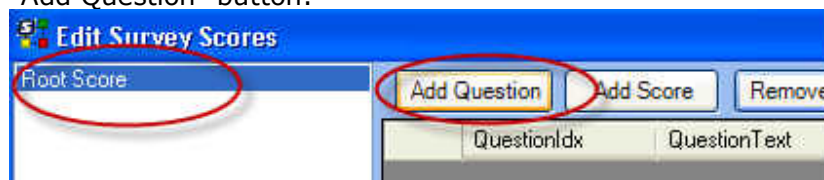
1. Select the main survey node from the questions tree, and switch to the "Advanced" tab:



2. Click on the "Edit Survey Scores" link to bring up the survey scores screen:



3. From the survey scores screen, select the "root score" item and then click the "Add Question" button:



4. In the question select screen, check all the questions that will influence the final score:



5. Click the OK button to add the selected questions

Adding more than one score to a survey

Sometimes you will want to have more than one root-score to a survey. For example, say you are conducting an in-store survey. Typically you will have questions that measure personnel service, store cleaning conditions, sales personnel performance etc. You then want to configure a final score that is made up of:

1. Service score
2. Store condition score
3. Sales performance score

Since every one of these individual scores is interesting as well, you can configure SurveyToGo to save the score for each and then make the final score reflect these sub scores with the relevant weights.

How to make it work

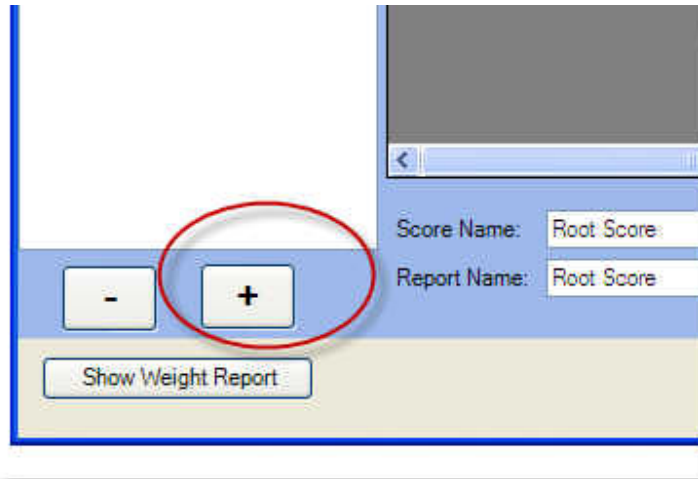
Configuring

1. Adding and naming the sub-score.
2. Adding the sub-scores to the root score

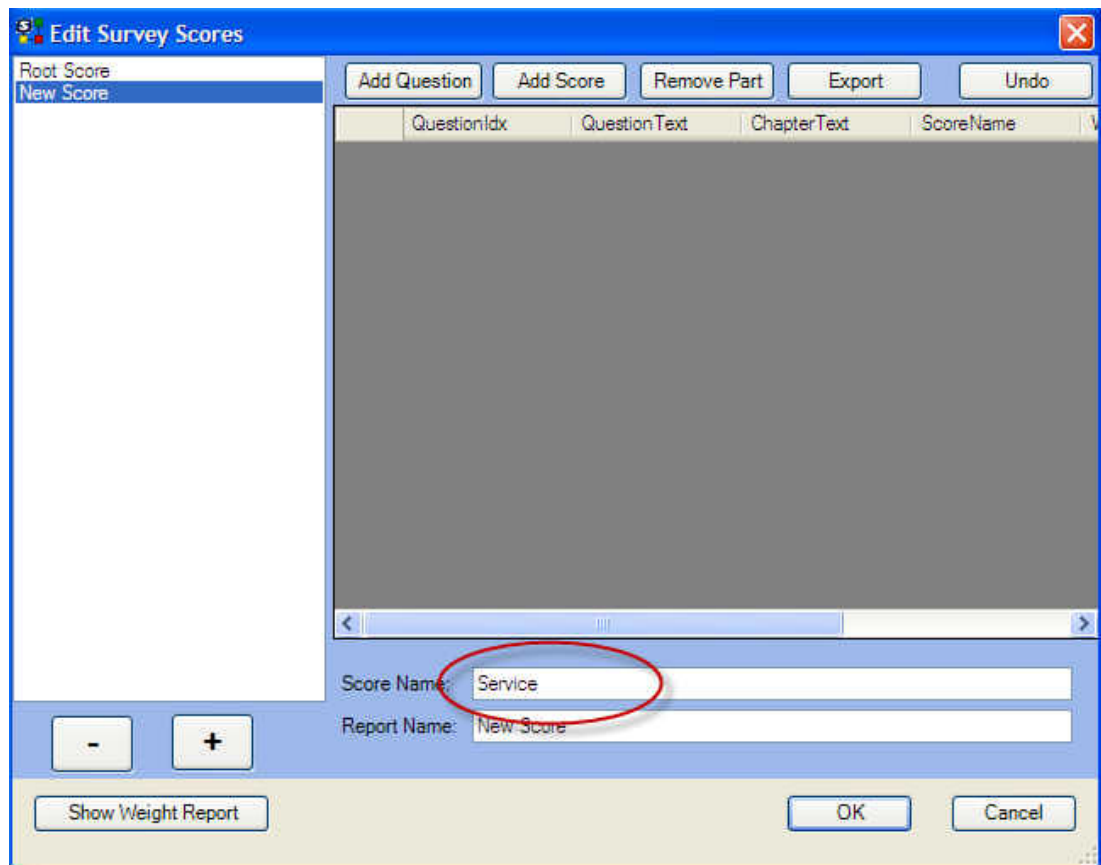
Step 1: Adding and naming the sub-scores

To add more scores to the survey follow these steps:

1. In the scores screen, click the "+" sign on the bottom:



2. Then, give the new score a name by changing the "Score name" field (you can ignore the "Report name"):



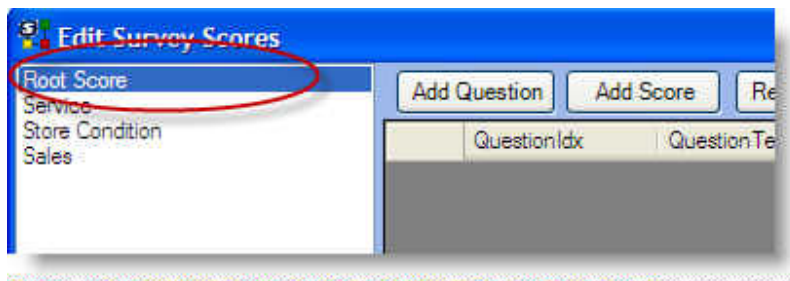
Note there is NO need to press any key in order for the score name to take effect.

3. Click the "Add questions" to add the relevant questions to the score just as you would normally do with the root score.

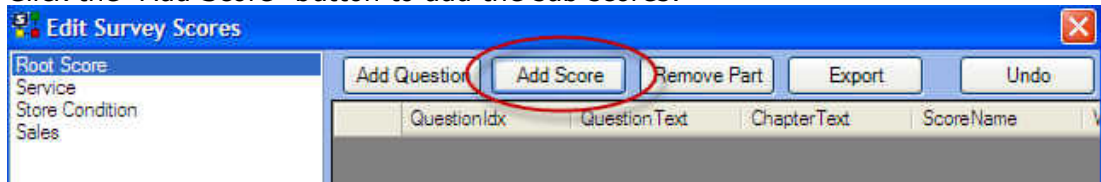
Step 2: Adding the sub-scores to the root score

Once you are done adding the sub scores to the scores screen, it's time to configure the root score to derive its score from the sub scores:

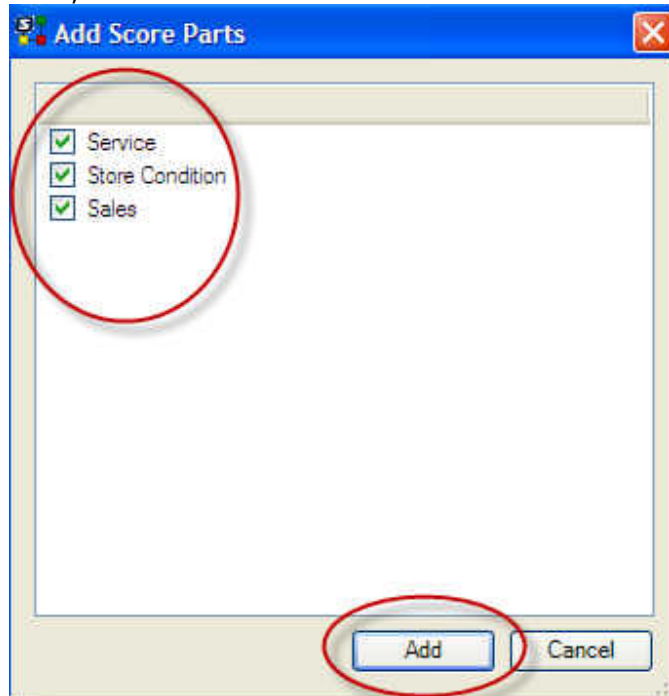
1. Click the root score item from the scores list so that it is selected:



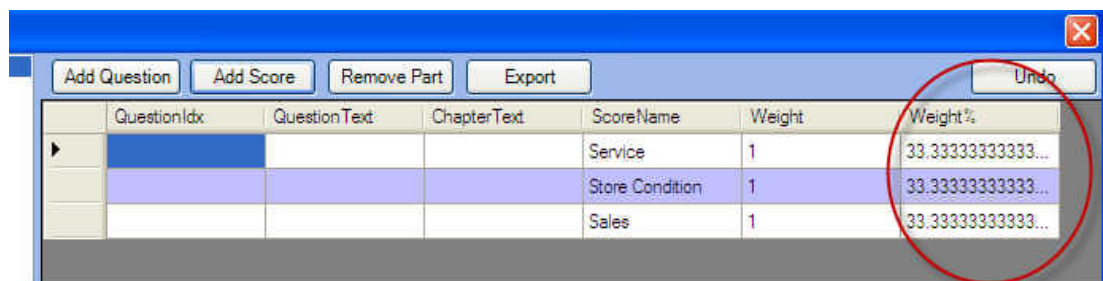
2. Click the "Add Score" button to add the sub scores:



- Then, select the sub scores that you want the root-score to derive its score from, and click the "Add" button:



- You can then change the weights of each of the sub scores by changing the numbers on the grid. By default the scores are given equal weights:

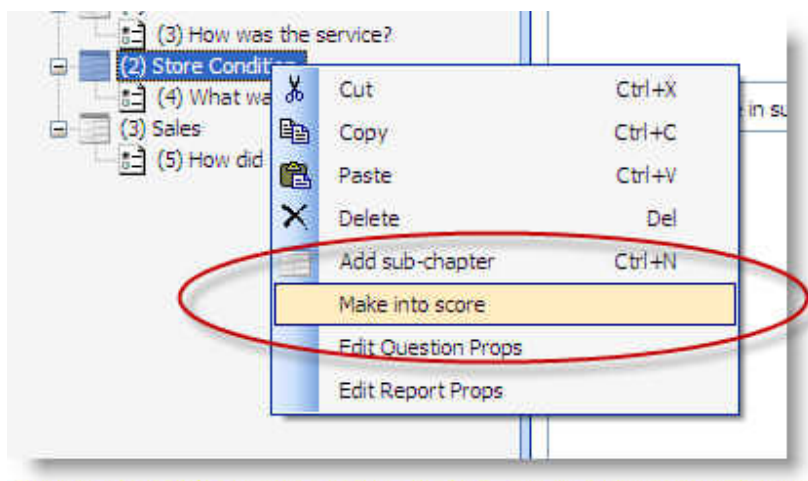


- That's it!

Generating a score out of an entire chapter at once

When using chapters, SurveyToGo supports an easy way to add all the questions of an entire chapter as a score in one click instead of going through the lengthy process shown at the beginning of this chapter which includes adding the score and then adding all the questions of the score. To add all the questions of a chapter as a score in one click:

1. Right click the relevant chapter and select the "Make into score" option:

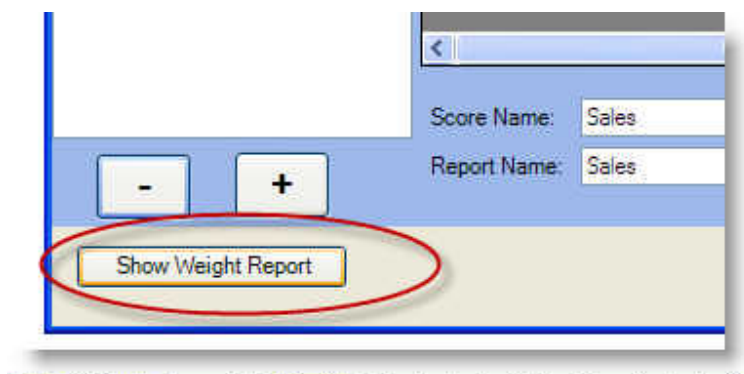


2. When browsing the scores screen you will see a new score was added with the name of the chapter.

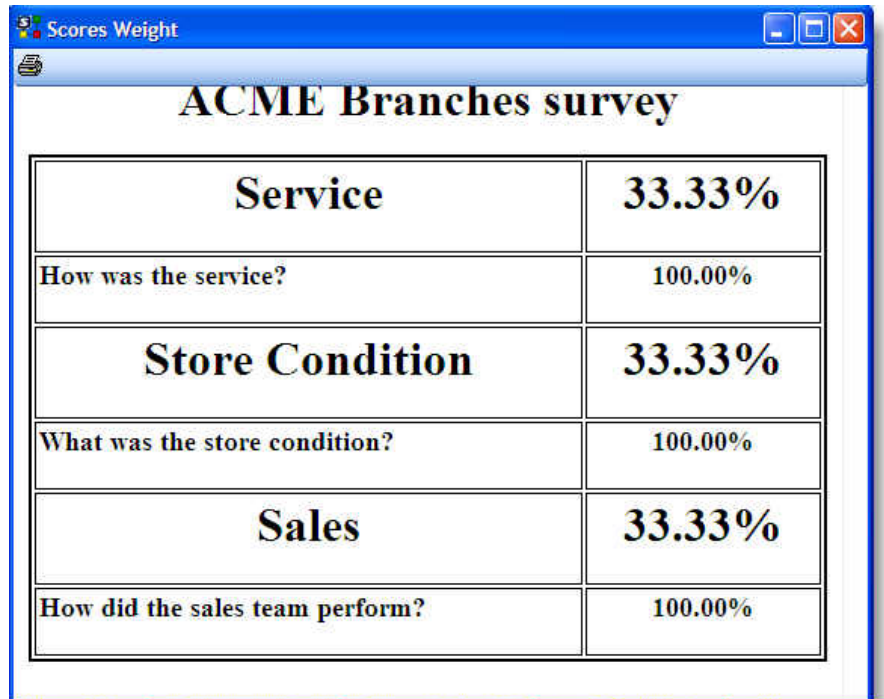
Weight report

When using sub scores, you can easily get a nice report of the weight distributions across your survey scores. To get the report:

1. Click the "Show weights report" button on the scores screen:



2. You will then see a report of the weights:



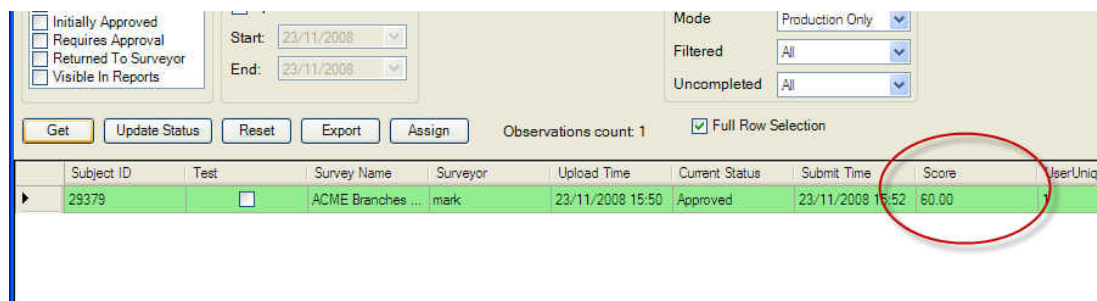
Service	33.33%
How was the service?	100.00%
Store Condition	33.33%
What was the store condition?	100.00%
Sales	33.33%
How did the sales team perform?	100.00%

Scores output when exporting

Scores are exported along all the other variables of the survey which enables you to easily get the scores of a survey.

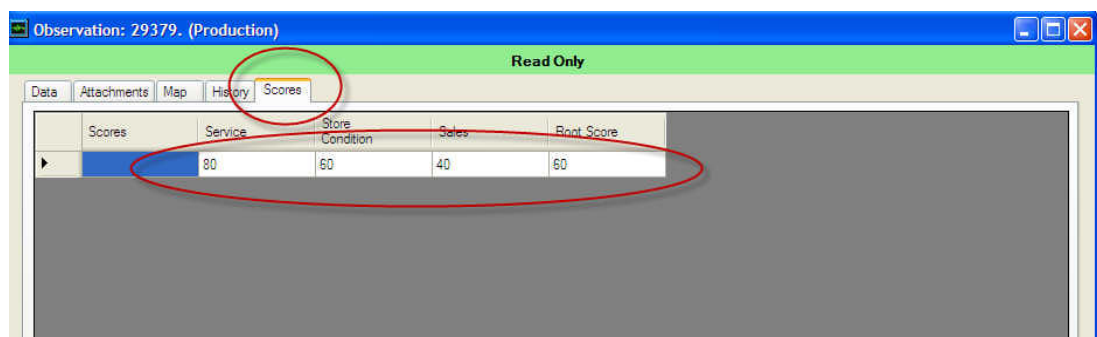
Scores output in the operations console

Scores can also be viewed from the operations console on the main grid:



Subject ID	Test	Survey Name	Surveyor	Upload Time	Current Status	Submit Time	Score	UserUnique
29379	<input type="checkbox"/>	ACME Branches ...	mark	23/11/2008 15:50	Approved	23/11/2008 15:52	60.00	1

The main grid only shows the root score. To view the sub scores, simply double click the relevant row and switch to the "Scores" Tab:



Scores	Service	Store Condition	Sales	Root Score
80	60	40	60	

You will see a cell for each of the different sub scores along with the root score.

Chapter 14 – Programming Loops

Overview

Loops are very helpful when programming surveys. Loops enable you to write a set of questions once and then display this set of questions for any number of times without having to "copy & paste" these questions. Loops are implemented in SurveyToGo as a property of a chapter. This means that once you configure the chapter to loop, all the questions inside this chapter will be displayed according to the loop settings.

How to make it happen

Configuring loops is very easy. Simply follow these steps:

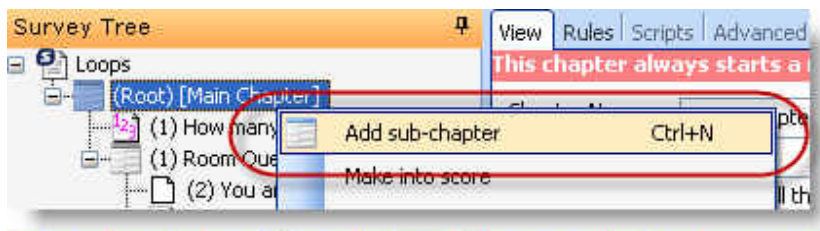
1. Add the questions you would like to loop, and make sure to put them under a chapter.
2. Configure the loop options of the chapter.

Below you will find 2 examples of common looping scenarios and how to configure them:

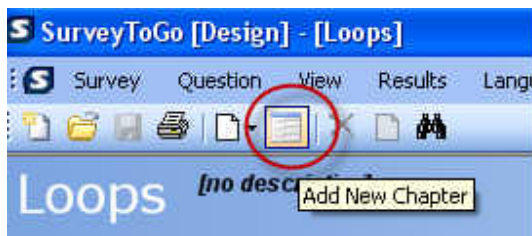
1. Example 1: Looping for X number of times according to a **numeric question**
2. Example 2: Looping for X number of times according to a **multi select question**

Step 1: Add the questions you would like to loop

The first thing to do when working with loops is to add a chapter and then add all the questions you wish to include in the loop under that chapter. To add a chapter, either right click the Root Chapter and select "Add sub-chapter":



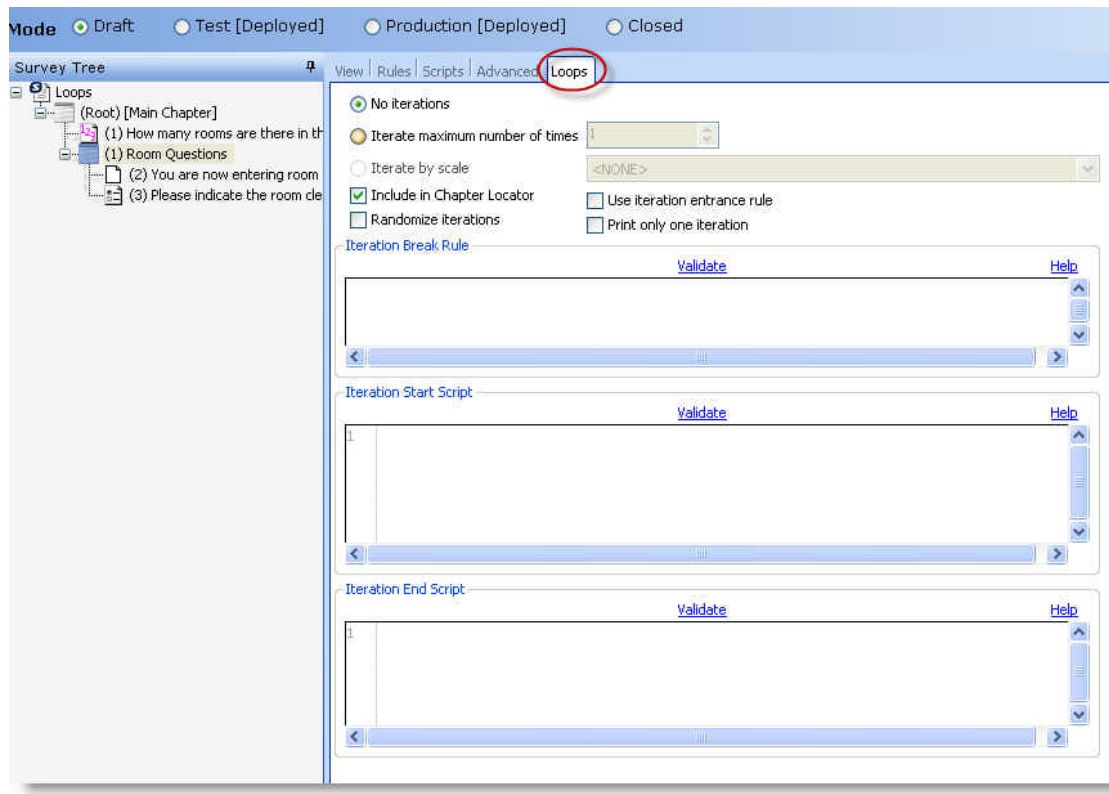
Or select the "Add chapter" from the toolbar menu:



Then follow the regular procedure to add questions under that chapter. Please refer to earlier chapters in this manual to learn more about adding questions and chapters.

Step 2: Configure the loop options of the chapter

Once all the questions are in place, click on the chapter that contains them and select the "Loops" tab:



The loop tab contains the following iteration options:

Option	Description
No Iterations	Do not loop this chapter
Iteration Maximum number of times	Loop this chapter based on a maximum number of times
Iterate By scale	Loop this chapter through the items present in a pre-configured scale – see Chapter 12 for scale reference
Include in Chapter Locator	Include all the loops of this chapter in the chapter locator if the chapter locator is enabled.
Randomize Iterations	Loop this chapter each time using a different order. Specifically useful when used with scales.
Use Iteration Entrance Rule	Use an entrance rule when looping. If the entrance

Print only one iteration	rule evaluates to false, the specific iteration will be skipped. By default this setting is false. When printing the survey using the "Survey > Print" action, print only the first iteration.
---------------------------------	---

The tab also contains the following code sections:

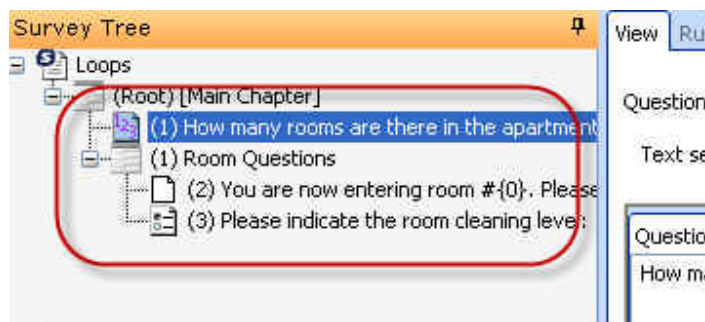
Section	Description
Iteration Break Rule	If this expression is true, the loop will end.
Iteration Start Script	This script will be run at the start of each iteration of the loop.
Iteration End script	This script will be run at the end of each iteration of the loop.
Iteration Entrance Rule	If the entrance rule evaluates to false, the specific iteration will be skipped.

Example 1: Looping for X number of times according to a numeric question

Let's suppose we need to ask a certain set of questions for each room in an apartment. In this case we will first ask how many rooms there are in the apartment, and then loop through the per-room questions for the number of times necessary. To perform this example we will do the following:

1. Add the numeric "how many rooms" question + add the chapter with the "per-room" questions.
2. Configure the looping.

Step 1: Add the numeric "how many rooms" question.

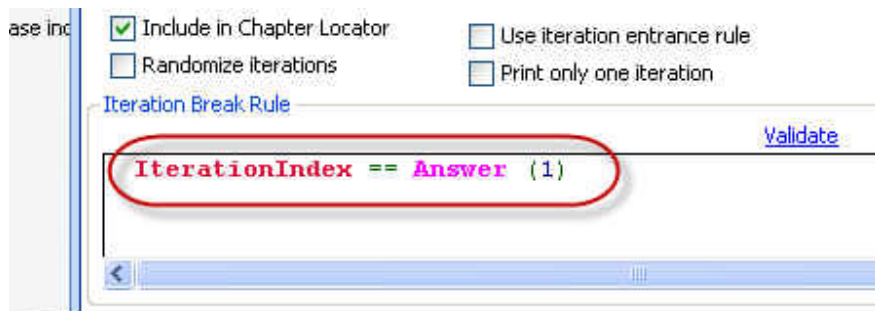


Step 2: Configure the looping

We will assume there are a maximum of 8 rooms in the apartment and will there for set the "Maximum Iterations" to 8:



We will then configure the break rule to stop the rule when we hit the number of rooms that was specified in Q1:



Note the use of the new "IterationIndex" value that specifies the current iteration number. The code above checks the answer to Q1 and when the current loop reaches that number, the loop will break.

You can now run the survey and see how it works.

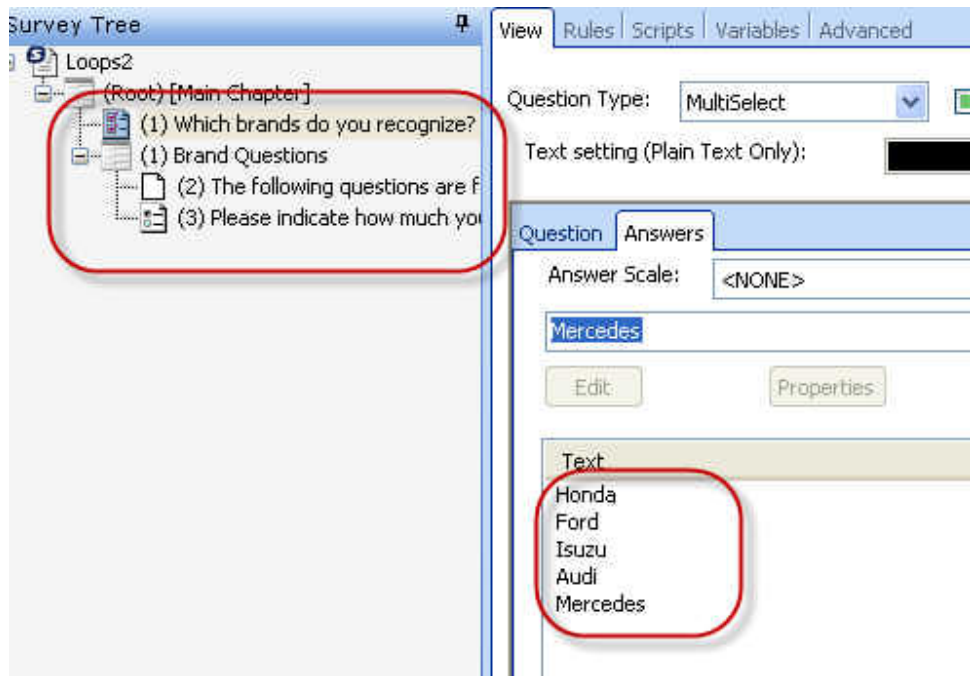
Example 2: Looping for X number of times according to a multi select question

Let's suppose we need to ask a certain set of questions for each brand that the respondent has recognized. In this case we will first ask which brands the respondent recognizes, and then loop the "per-brand" questions only through the brands that were specified.

To perform this example we will do the following:

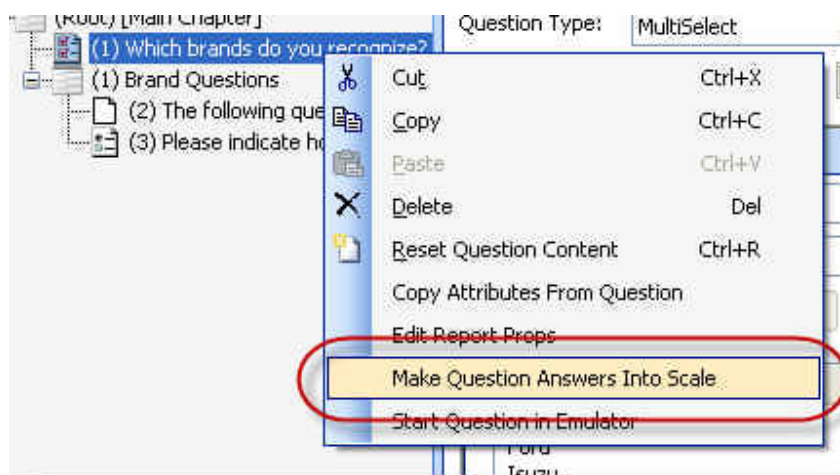
1. Add the multi select "Which brands do you recognize" question + add the chapter with the "per-brand" questions.
2. Configure an answer scale for easier looping configuration.
3. Configure the looping.
4. Show the brand name in the first question.

Step 1: Add the numeric questions



Step 2: Configure an answer scale for easier looping configuration

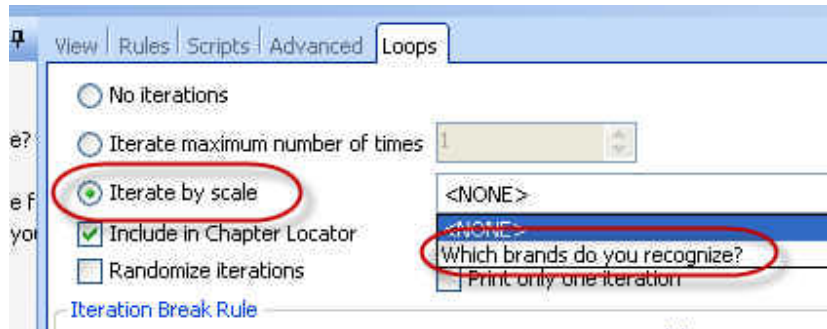
To quickly create a scale out of a question answers, you can right click on the question and select the "Make into scale" option:



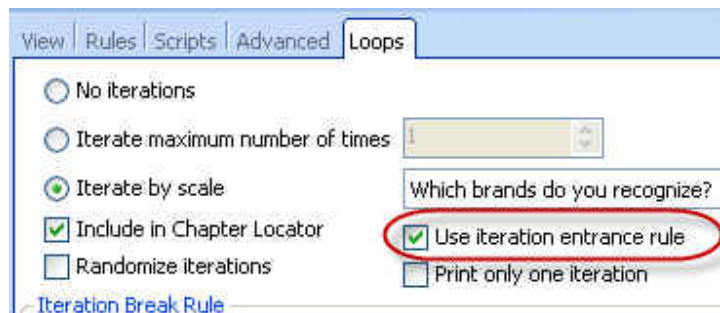
You will now be able to reuse this scale throughout the survey and also in the Loops tab as you will see below. Please refer to Chapter 12 for more information about scales.

Step 3: Configure the looping

We will use the newly created scale when configuring the looping parameters:



This instructs the survey to loop through the available brands in the list of brands we have configured. We will now add an entrance rule to make sure the survey skips the brands which were NOT selected in Q1. First, select the "Use entrance rule" option:



Then add the following entrance rule. Make sure you are adding the code to the Iteration Entrance Rule section:



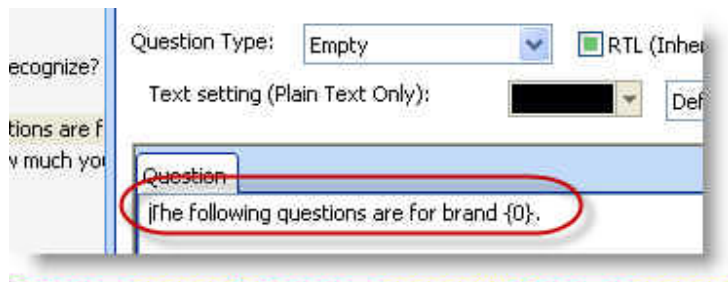
Since the chapter loops through the scale that is also used with Q1, this rule checks if the user has selected in Q1 the current iteration item.

You can now run the survey and see how it works.

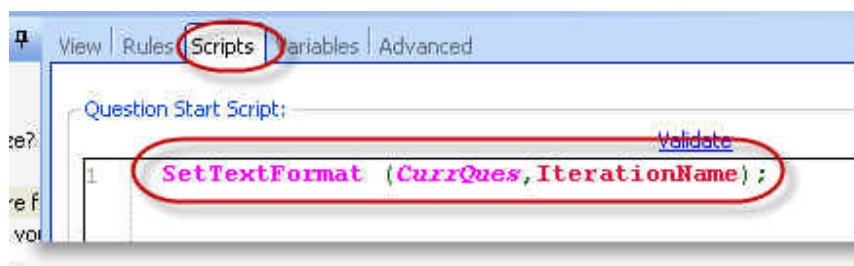
Step 4: Show the brand name in the first question

You can make use of the newly introduced "IterationName" value to show the name of the brand anywhere you need to. Let's configure the first question of the loop chapter to show the current brand name for which we will ask questions.

Below is the text of the empty question that will hold the brand name. Notice the {0} at the end that is used for text substitution:



Now, let's add a start script to this question that will replace the {0} with the current brand name:



Notice the use of the "IterationName" value to specify the current iteration name. Please note that since we are iterating through a predefined scale, the IterationName equals the name of the answer from the scale which in our case is the brand name.

Chapter 15 – Loading Excel Lists As Question Answers

Overview

Coming soon.

Chapter 16 – Advanced Topics

Showing table of contents

When you are working with Chapters and sub chapters, SurveyToGo includes the ability to show a table of contents menu on the PDA for quick navigation through the survey. To enable the Table Of Contents feature:

1. Go to the Root-Chapter of your survey
2. In the "Advanced" tab, check the "Show in TOC" checkbox.
3. Go to each of the chapters that you want to show in the TOC menu and in their "Advanced" tab, check the "Show in TOC" checkbox.

Note: the name of the Root-Chapter will be the name that will be shown in the TOC menu. So you get the power to control what the menu name will show by changing the Chapter Name of the root-chapter.

Showing the top panel

SurveyToGo supports showing a top panel while running the survey on the PDA. You can write any text that you wish in the top panel and also interact with the top panel from question start and end scripts. Common usages for the top panel are:

- Showing a question answer on the top panel for the rest of the survey run.
- Showing the current date
- Showing any custom text that you want to show.

To enable the top panel:

1. On the Survey Properties page, check the "Show Top Panel" checkbox
2. In the Survey Rules page, add the following code in the "Survey Init Code" textbox: `TopBanner.Visible = True;`
3. Then, you can change the text of the text box in any question start or end script by coding the following line in the question start/end script textbox: `TopBanner.Text = "Just a text";`

Note that you can also change the panels back and fore colors and the font size and type. Please refer to the "SurveyToGo Expressions Guide, Chapter 4 – Built In Functions" under the "Visual functions for a list of properties and interactions with the TopBanner.

Running the survey in loop

SurveyToGo supports a mode where on the PDA, once you complete a survey, you are automatically directed to a new survey form without the need for pressing the "Run" button again. This is useful for small surveys that need where fast entry of surveys is of the most importance. To enable a survey to "Run in a loop":

1. In the Survey Properties tab, check the "Run in a loop" checkbox.

Hiding the back button

SurveyToGo supports hiding the back button while running the survey on the PDA. To enable this:

1. In the Survey Properties tab, check the "Hide back" checkbox.

Showing a custom Logo throughout the survey on the device

SurveyToGo supports showing a custom logo picture while running the survey which can be used to give the survey a more "customer" look & feel. To show a custom logo:

1. Add your logo as an attachment to SurveyToGo as described in Chapter 5.
2. When adding the attachment to your survey, make sure to give the attachment the "stgLogo" code name, this special code name will make SurveyToGo use this picture as a logo when running the survey.